

Financial Planner for an independent boutique firm located in Hamilton, Ontario.

We are a small but thriving financial planning firm looking to add an experienced financial planner to our team. The ideal candidate puts the client first and can provide advice, guidance, and education to clients in the following areas:

- Investments
- Retirement
- Taxes
- Insurance
- Estate
- Financial planning

This position is ideal for a self-starter with an entrepreneurial spirit. You will be responsible for building your own client base, as well as working with existing clients of the firm. A financial planner in this role will benefit from daily support and one-on-one expertise from an experienced Certified Financial Planner® professional with more than 40 years of service.

Income, vacation, and benefits will be discussed in the first interview. There is an opportunity for a qualified candidate to buy into the business.

Ideal Qualifications:

- Holds or currently pursuing the CFP® designation
- Existing book of business
- MFDA designation
- Life insurance license

In addition, the appropriate candidate will possess the following attributes:

- Strong verbal and written communication skills
- 3+ years of experience
- Proficient in technology platforms, including Microsoft Word, Outlook, and Excel
- Experience using financial planning software, and Morningstar advisor workstation
- Possess excellent problem solving and strategic thinking skills
- Work independently
- Detail oriented
- A passion for wanting to work with clients to help them find the best solutions for their money