

RAYMOND JAMES®

At Raymond James, we develop, we collaborate, we decide, we deliver, and we improve together. Raymond James Ltd. is Canada's leading independent investment dealers offering high quality investment products and services to Canadians seeking customized solutions to their wealth management needs.

Financial Planner

Job Code: 2102863
Downtown Vancouver
Permanent Full Time

Job Summary

The Financial Planner will be part of an integrated process that is dedicated to serving our clients with a higher level of service. This position is ideal for someone looking for a long-term career where they can utilize their planning skills for the benefit of the clients we serve on behalf of an expanding client base.

Essential Duties and Responsibilities

- Prepare both simple projections and comprehensive financial plans;
- Include tax recommendations – i.e. CPP/OAS payments, advice on RIF conversions, tax rates, corporate details, etc.;
- Liaise with our complimentary departments (tax, insurance, trust) and make note of any estate-related recommendations/to-do's;
- Fulfill a client facing role in presenting and updating financial plans and progress reports;
- Assist with cash flow projection and tax analysis;
- Help with insurance, financial and estate planning if you have experience and knowledge (if not this would be an area of growth); and
- Assist with cash flow projection analysis and tax package preparation.

Knowledge, Skills, and Abilities

Knowledge of

- Financial Planning; and
- NaviPlan and Snap software is an asset.

Skill in

- Microsoft Office with a willingness and ability to learn new applications;



- Client service, time management, and decision making;
- Organization, multi-tasking, and prioritizing; and
- Problem solving and exercising sound judgement.

Ability to

- Work within deadlines in a high-volume and demanding environment while maintaining a high level of service and an imperative attention to detail;
- Demonstrate advanced face-to-face, email, videoconferencing, and telephone etiquette and relationship management skills;
- Work independently as well as collaboratively within a team environment;
- Assist others with flexibility and willingness as required;
- Demonstrate a professional manner to establish and maintain effective working relationships at all levels of the organization;
- Exercise tact and discretion in the handling of confidential information; and
- Communicate proficiently in French is an asset.

Educational/Previous Experience Requirements

- Practical experience in higher level planning, i.e. the integration of closely held corporations, trust, and/or cross border experience; and
- An accounting designation or relevant experience/education is an asset.

Licenses/Certifications

- Certified Financial Planner (CFP®) designation or near completion of the CFP® designation is required.

What can you expect from us?

Our most important investment is in people. Raymond James Ltd offers a competitive compensation and benefits package, including health & dental, life insurance, retirement savings, employee stock purchase program and corporate discounts. We also support internal promotion and community involvement.

If you would like to join our team, please apply by visiting the following link **by November 30, 2021**. This link will take you to our company's career website where the posting is listed.

https://raymondjames.taleo.net/careersection/1_ca/jobdetail.ftl?job=2102863&tz=GMT-08%3A00&tzname=America%2FLos_Angeles

Human Resources
Raymond James Ltd.



To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company, including but not limited to a credit and criminal record check. Employment is contingent on the satisfactory completion of a pre-employment background check.

We sincerely thank all applicants who express an interest in this role: only those being directly considered will be contacted.

Raymond James Ltd. recognizes the value of a diverse workforce and appreciates the unique skills and special contribution of each employee. We are committed to accessibility for candidates through all stages of the recruitment process. Should you require accommodation, please contact Human Resources via email at resumes@raymondjames.ca.

