

RAYMOND JAMES®

FINANCIAL PLANNER

Toronto, Ontario
Job Posting # 112021

Raymond James Ltd. is seeking a Financial Planner to work in one of our Toronto Independent Financial Services office.

Raymond James Ltd. is Canada's leading independent investment dealer offering high quality investment products and services to Canadians seeking customized solutions to their wealth management needs.

You will be part of a dynamic team that is dedicated to serving our clients' with a level of service excellence. This position is ideal for someone looking for a long term career where they can utilize their investment industry knowledge and grow with the company.

Specifically you will:

- Prepare financial plans, projections and analysis as required.
- Prepare portfolio reviews and investment management proposals;
- Assist in answering client questions regarding their accounts and financial plans;
- Co-ordinate with our Head Office Retirement, Insurance and Estate Financial Planning departments on more complex financial plan preparation.
- Liaise with our Head Office Tax Department as required.
- Monitor daily cash balances and help with recommendations;
- Review risk tolerance and asset allocation during portfolio review preparation;
- Follow up on movement of money between client accounts to ensure accuracy;
- Investigate and resolve account-related inquiries;
- Utilize related software to run reports and queries for various monthly processes;
- Assist with cash flow projection analysis and tax package preparation;
- Help with research if you have the experience and knowledge (if not, this would be an area of growth); and
Help with insurance, financial and estate planning if you have experience and knowledge (if not this would be an area of growth).

To qualify for this opportunity you possess:

- Experience with Razor financial planning software an asset;
- Experience in the investment industry an asset;
- Experience with a client (CRM) database an asset;
- Cross border knowledge of basic taxation issues an asset;
- Candidate RR licensed with completion of the Canadian Securities Course (CSC) and Conduct and Practice Handbook (CPH) Course would be beneficial;
- QAFF or in the process of obtaining CFP designation would be considered an asset;
- Completion of a University degree or College diploma in accounting or business is an asset;
- Proficiency with MS Office including Word, Excel and Outlook;
- Experience in entering investment transactions is an asset;
- Strong analytical and communication skills with a high degree of accuracy is essential;
- Strong organizational and time management skills with the ability to prioritize; and



- Flexibility and willingness to assist others as required.

This is a permanent full-time position with a competitive compensation and benefits package.

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 112021 by [November 26th 2021] to: mary.low@raymondjames.ca**

To be considered for employment candidates will be required to provide proof of full vaccination, Cdn 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.

