Financial Planning Consultant

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Do you strive to be the best and provide a high level of communication and service with your clients?

Are you currently working with clients on their financial plans? Do you hate sales targets and do you want to just work with your clients? We need you! You can bring your existing clients with you, but we want you to work with our existing clients, and put clients priorities first.

We are hiring for the position of **Financial Planning Consultant** who will work with our individual clients on their insurance and investments needs, as well as provide consulting in tax planning, estate planning and cash flow planning. The ideal candidate will have a positive attitude, enjoy working in a team environment, very organized and exceptional communication skills written and verbal.

Key Responsibilities

- Work closely with existing and prospective customers to provide financial reviews, discuss portfolio updates and suggest additional personalized solutions based on their financial goals
- Organize and prepare written summaries of clients insurance and investment plans
- You will work closely with the Owner to meet with existing clients, cold calling is not required.
- Play a key role in advising clients of high level financial solutions from a range of insurance and investment products
- Contact clients for annual reviews and follow up, maintain consistent contact with clients
- Meet with clients over phone, zoom or in-person and conduct organized financial planning meetings
- Conduct training presentations to clients on new insurance products and investment plans
- Works with our team to ensure client is communicated with on their financial plan
- Attention to detail in preparing plans and completing documents

The Opportunities

- You will work onsite in our professional business office in Saskatoon

IN THIS SECTION

Financial Planning Consultant (https://www.brightrock.ca/care planning-consultant/)

- Full time work Monday to Friday 8:30am to 4:30pm, no overtime is required
- Salary will reflect experience, licensing and qualifications in the range of $55,000 to $70,000 per year
- Vacation includes 3 weeks plus an additional week during Christmas break
- Participation in group retirement plan after 3 months of employment
- Professional business dress code is required
- This is a non-smoking office and references are required

Qualifications:

- Motivated, quick learner who works well individually as well as a member of a team
- Able to manage multiple tasks with a high level of accuracy, meet deadlines and work under pressure
- Excellent problem solving, organizational skills and time management skills
- Detail oriented, team player, "can-do" attitude and enthusiasm

- Takes initiative and has ideas to present to clients
- Police background check will be required before successful hire
- Life license, CEB or GBA designation will be an asset
- CFP, PFA or PFP certification will be an asset
- Post-secondary or undergraduate degree will be an asset
- Completion of IFIC or CSC course will be an asset

Requirements:

- Minimum of 2+ years with a financial planning firm or bank
- Experience working with investments such as mutual funds, stocks or segregated funds
- CFP, PFA, or PFP
- Excellent verbal and written communication skills in English
- Proficient in Word, Excel, PowerPoint and high aptitude for learning new software
- Microsoft Outlook
- Familiar with: Maximizer, Microsoft 365, DropBox or equivalents;
- Internet savvy
- Insurance quotation software – will train on site

Personal Characteristics:

The Financial Planning Consultant will demonstrate competence in the following areas:

- Relationships: Maintain positive working relationships with others, both internally and externally
- Communication: Excellent listening skills, oral and written communication skills, and a pleasant phone manner
- Needs Assessment: Anticipate, understand, and respond to the needs of their employer and the clients to meet or exceed their expectations

- Teamwork: Follows direction well, work cooperatively and effectively with others to set goals, resolve problems, and make decisions to enhance company's effectiveness; ability to undertake self-directed tasks when necessary
- Organization: Excellent time management skills; excellent attention to detail; the capacity to prioritize by assessing situations to determine urgency; ability to develop a work schedule, and ability to make clear and timely decisions

Brightrock Financial Inc

Over the last 13 years, Brightrock Financial has developed a strong reputation in financial planning and insurance consulting in Saskatoon. We offer a comprehensive range of financial services, including the management of individual insurance plans and investment portfolios; the development of corporate buy/sell agreements; and the administration of group benefits and pension plans. Our ability to provide superior guidance is evident from our prestigious list of clients. We are a small staff and we are looking for a great team member to join our hardworking group! We strive to be the best and provide a high level of communication with our clients.

How To Apply

If you are interested in this position and would like to proceed through our hiring process, please email the following as soon as possible. Start date is flexible for Summer 2021.

- Cover Letter must include salary requirements and why you feel you are good fit for this position
- Resume + References

SEND to BrightrockOffice@gmail.com (mailto:BrightrockOffice@gmail.com). NO phone calls please, and do not contact the Company directly. Thank you.

Posted: March 21, 2021
Closing Date: April 30, 2021
Hiring Date: July 1, 2021

CONTACT INFORMATION

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