Wealth Management

Financial Planning Software Solutions Consultant, RBC Wealth Management - Toronto

What is the opportunity?

As an integral member of the Wealth Management Services (WMS) team, this position supports the entire RBC sales force in Canada (Investment Advisors, Associates, Financial Planners, Investment & Retirement Planners, Private Bankers and PH&N Investment Counsellors) in differentiating the client experience by providing clients with financial advice and planning solutions. This centralized support involves being the technical expert of the Horizons (NaviPlan) suite of financial planning tools (Calculators, Financial Assessment and Goals Based Planning), our internally developed myGPS™ and WMS Calculators. Technical expertise includes integrating financial advice and planning recommendations into the coaching conversation with the sales force. The Consultant will also be a key partner in enabling revenue generation through opportunity spotting for consolidation and referral business to key partners. **Note that this is a financial planning role with a software focus and not a technology support position.**

What will you do?

- Financial Planning Tools Support – Assist the various RBC sales forces in using the corporate approved financial advice and planning tools to respond to client queries, uncover hidden assets, retain business, and develop referrals.
- Testing – Conduct Quality Assurance and User Acceptance Testing of updated or newly created tools that are developed internally or purchased from external vendors.
- Coaching – Provide ongoing coaching to users directly or by referring them to job aids and other resource material.
- Documentation – Create and update job aids, user guides and other resources; assist in ensuring that financial advice and planning tools reports, questionnaires and marketing materials are updated on a regular basis and develop new documents as required.
- Training – Working with Canadian Banking or Dominion Securities' Learning Services groups, contribute to the development and updates of training programs and supporting material. On occasion, deliver training to the Dominion Securities sales force.
- Projects – Participate in various working groups & cross-departmental projects.

What do you need to succeed?

Must-have

- Knowledge of financial planning software (Horizons (NaviPlan) preferred)
- Minimum 2 - 3 years of experience in the financial planning / wealth management industry
- CFP, R.F.P., FMA, CIWM, IQPF, or PFP designation
- Bilingual (French / English) preferred, both oral and written
- Understanding / knowledge of Canadian taxation and pension legislation
- Excellent verbal and written communication and interpersonal skills
- Above average analytical and judgment skills
- Ability to think on one's feet and pivot from topic to topic

- Ability to complete tasks independently and collaboratively with colleagues and partners
- Ability to prioritize and organize simultaneous assignments and meet deadlines
- Service oriented attitude and desire for future growth potential

What's in it for you?

We thrive on the challenge to be our best, progressive thinking to keep growing, and working together to deliver trusted advice to help our clients thrive and communities prosper. We care about each other, reaching our potential, making a difference to our communities, and achieving success that is mutual.

- A comprehensive Total Rewards Program including bonuses and flexible benefits, competitive compensation, commissions, and stock where applicable
- Leaders who support your development through coaching and managing opportunities
- Ability to make a difference and lasting impact
- Work in a dynamic, collaborative, progressive, and high-performing team

About RBC
Royal Bank of Canada is Canada's largest bank, and one of the largest banks in the world, based on market capitalization. We are one of North America's leading diversified financial services companies, and provide personal and commercial banking, wealth management, insurance, investor services and capital markets products and services on a global basis. We have over 80,000 full- and part-time employees who serve more than 16 million personal, business, public sector and institutional clients through offices in Canada, the U.S. and 37 other countries. For more information, please visit rbc.com.

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Expand your limits and create a new future together at RBC. Find out how we use our passion and drive to enhance the well-being of our clients and communities at rbc.com/careers.

Inclusion and Equal Opportunity Employment
RBC is an equal opportunity employer committed to diversity and inclusion. We are pleased to consider all qualified applicants for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, protected veterans status, Aboriginal/Native American status or any other legally-protected factors. Disability-related accommodations during the application process are available upon request.