



FRASER & PARTNERS

Financial Strategy LIFE ALIGNED®

Financial Life Planner

Does this environment sound like a fit for you?

We are building a collaborative team of specialists who are driven by our clients' values, priorities, and the vision they hold for a fulfilling life. We are independent and work with integrity, building the firm by providing value. Our days are filled working on financial life plans, reviewing strategies with clients, and implementing detailed action plans that include investments, insurance, banking, and other solutions.

We are different.

- ***Life comes before the numbers.*** We do not base plans on financial goals and objectives alone. We drill down to what is most important to our clients, identifying values, discussing their importance, working through differences, and identifying common ground on which to build a successful financial life plan.
- ***We do not "tell" our clients what to do.*** We work collaboratively providing "what if" scenarios so that clients can see themselves in the solutions and determine what works best for them.
- ***We do not "sell" products.*** Clients are welcome to enlist our planning services without any obligation to implement investment, insurance, or any other products. If it is determined that we will handle the implementation of the financial life plan, product solutions are derived from the overall strategy and based on specific needs.
- ***We are independent and not under any directives.*** We provide a wide range of product options for clients to choose from based on their unique needs.
- ***We work collaboratively in planning teams.*** Each member of the team has a role in adding value to our clients' experiences with us.

We are looking for financial life planners with skills, integrity, work ethic, and heart.

To be a fit with our team you must:

- Care deeply about the well-being of our clients, understanding that the work you do has an impact on their lives over time.
- Work from the highest level of integrity.
- Be motivated and the best you can be every day.
- Be prepared to roll up your sleeves and work in a setting that is *focused, fast, flexible, friendly, and fun*.
- Earn your share of ownership in the firm.
- Be flexible and learning continuously.
- Participate in the use of our systems and processes and help to improve our level of client service.
- Be a team player – **ego in check!**



FRASER & PARTNERS

Financial Strategy LIFE ALIGNED®

As a financial life planner, you will have:

- The CFP and preferably CLU and/or CIM designations or be working toward these designations.
- A post-secondary degree or diploma.
- A minimum of 5 years of experience in the financial services industry working with an advisor and clients or managing your own client base.
- Advanced technical skills and knowledge including proficiency within Microsoft 365 (Teams, SharePoint, Dynamics, Outlook, Excel, Word, PowerPoint, OneNote, etc.) and the ability to quickly get up to speed on other platforms such as planning software, investment, and insurance tools. Experience with Vision Systems Corp. planning suite an asset.
- Strong analytical skills with a penchant for details and accuracy.
- Excellent written and verbal communication skills.
- Exceptional relationship and coaching skills to help keep clients on track with their life plans.
- High EQ! Emotional intelligence is a key aspect of our work with clients and in a team setting.

The Opportunity.

If it is determined that there is a fit and you decide to join us, you can expect to:

- Spend most of your time communicating with clients, collaborating on the design of financial life plans, implementing solutions, and reviewing progress.
- Assist with and build relationships with our existing clients.
- Work with any clients you bring along and move them into our life aligned planning process model.
- Get out there in the community and talk about what we're doing.
- Contribute blog and presentation content in your area of specialization.
- Take on special projects and/or head up committees to improve on our services and elevate existing processes.
- Have an impact on where we're going as a firm.
- Gradually become a shareholder as you achieve key team and individual performance targets.
- Love your workplace! We are a team of skilled, dedicated people and it is truly exciting to work in an office at The Forks and from home – we do both.

If you can see yourself in this description – working with us and loving your work – please [submit your resume](#) along with your thoughts on how you see yourself as a fit with the Team.