Jr. Financial Advisor

Do you have a passion for helping other achieve their financial goals? Do you love exploring and understanding investment options that best suit customers' financial needs? Are you looking to grow your career as a Financial Advisor in an innovative and leading-edge organization? Then join Life & Legacy Advisory Group as a Jr. Financial Advisor**.**

In this role, you are expected to:

- Play a key role in advising customers of high-level financial solutions,
- Work closely with Sr. Advisors, assisting them on client execution
- Engage with customers and create positive experiences to retain and deepen relationships
- Prospect and onboard new clients for Life & Legacy
- Increase customer financial confidence by providing personalized financial advice, answering customer questions, and addressing their concerns, raising matters as appropriate to team members or partners while maintaining confidentiality and accuracy
- Work closely with existing and prospective customers to provide financial reviews, discuss portfolio updates and suggest additional personalized solutions based on their financial goals
- Stay knowledgeable about emerging issues, evolving regulations and industry codes of conduct as well as participate in process improvement opportunities to protect the interests of the organization
- Strive to achieve and improve service level agreements and productivity targets
- Ensure documents are prepared consistent with relevant regulations and in a way properly reflecting business intentions

Job Requirements

- CFP, LLQP, and Mutual Fund License required.
- Post-Secondary or Undergraduate degree in related field is an asset
- Highly motivated to help clients
- Desire to be constantly learning and developing new skills

- Proficiency in software tools, Mac experience a plus
- Tactful communicator able to exchange ideas and customer information in a concise and logical way
- A self-initiator with strong organizational, planning and time management skills

Guiding Principles
At Life & Legacy we have Guiding Principles that ensure we achieve a common vision and purpose. It is essential that all employees at Life & Legacy embody these Principles.

- **Improving the lives of our clients**
  We work to improve the lives of our clients by providing sound financial advice and putting our client's interests ahead of our own at all times.
- **Trust & Mutual Respect**
  Our relationships with our clients, our suppliers, and our team are built on the principle of trust and mutual respect. We treat others with the same trust, dignity and respect that we would want for ourselves.
- **Learning & Change**
  The world is ever-changing. We embrace change and the learning that is necessary to respond and thrive in an evolving world.
- **Accountability**
  We work to honour our commitments and exceed expectations, both to our clients and within our team
- **Empowerment & Self Reliance**
  Our team is entrusted to embrace our guiding principles in concert with their ingenuity to “figure things out” so that they may enhance the lives of those with whom they work.
- **Wow Experience**
  We passionately strive to provide a WOW experience to everyone who deals with us
  so that they become our biggest fans and supporters. We work to build long-term relationships that reach beyond the lives of our clients to, in turn, touch the lives of their families and the next generation.

Applicants email their resumes to HR@lifeandlegacy.ca .