## Financial Planner (CFP) / Financial Advisor

### SUMMARY

Our well respected westside Vancouver financial advisory firm is seeking a mature, seasoned Financial Planner (CFP) / Financial Advisor to join our team.

We provide wealth management services to high net worth clients and we are growing. Our full-service approach focuses on financial planning and superior investment management, education and community outreach. Our distinct culture is built on a shared commitment to doing what is right for our clients, their families and our community and producing quality results. Pro bono service and strong social values are an integral part of our business platform.

This position has flexibility including remote/in-office and work life balance with a 4-day work schedule.

**Qualifications Required:**

- IIROC licensed or willingness to obtain;
- At least 5 years' investment and / or financial services industry experience speaking directly with clients and conducting one on one client meetings;
- Certified Financial Planner, Registered Financial Planning certificate or PFP;
- Insurance license an asset;
- Experience in managing client accounts using appropriate investment strategies, including discretionary managed portfolios;
- Experience with a client relationship management software such as Maximizer;

Thank you for your interest in this position. For more information or to submit your resume, please email erin.seibel@raymondjames.ca.