Associate Financial Advisor

Ross Taylor Financial Corporation is an independent financial planning firm that provides both Insurance and Investment products to help our clients achieve financial well-being. The main role is to support the senior advisor, by managing the client needs of the firm. This person must be personable, reliable and a self-starter. The ideal candidate will have some experience or related experience pursuing a career in the Financial Planning Industry.

Job Description:

- Service the financial needs of clients in partnership with the senior advisor and coordinate transactional needs of clients as required.
- Service the financial needs of clients during times when the advisor is not available.
- Accurately document all client interactions for follow up and compliance records.
- Assist in researching new products and services.
- Review client files and help determine agenda for proactive contact with client base.
- Identifying opportunities to help improve the clients' overall planning.
- Required to seek ongoing training and CE credits to maintain license and increase knowledge.

Additional Requirements:

- Must have a life insurance license and a mutual fund license.
- Certified Financial Planner (CFP) designation required or working towards the designation.
- A valid driver's license and operational vehicle with insurance to cover business use.
- Possesses strong communications skills both written and verbal.
- Highly organized and excellent time management skills.
- Ability to demonstrate problem solving and decision making skills.

Additional Information:

- It is understood you will have flexibility to work some evenings and weekends when required.
- Need to be willing to see clients out of the office or outside the Niagara region.

Skills:

- Intermediate to advanced skills in Microsoft Outlook, Word, Excel and PowerPoint.
- Proficiency with Act! or similar CRM software.