



Wealth & Estate Planner

Three60 Wealth & Estate Solutions is looking for a Wealth & Estate Planner to join its team in Calgary.

The Opportunity:

Three60 provides financial planning services to business and high net worth families. We help each family we work with identify and attain its own unique legacy goals. In this hands-on role, you'll work with Three60's clients to identify their goals and take the steps required to implement those goals so they become reality.

Our clients have complex needs, so we are looking for an experienced professional to fill this role. In this role, you can expect to:

- Lead clients through our goals-based discovery process
- Draft planning memos, financial plans, retirement projections and personal financial statements for clients
- Identify planning opportunities for clients
- Assist clients in implementing planning recommendations
- Stay current with current industry and financial planning concepts through rigorous continuing education
- Contribute in other ways to client and team success as required

Qualifications/Attributes:

- Detail-oriented
- Good communication skills
- Strong analytical skills with an ability to summarize detailed information clearly
- At least 5-years of experience in financial planning (ideally with business owners)
- CFP designation
- Understanding of retirement planning and estate planning
- Experience in dealing with investment planning
- Good grammar and spelling skills
- Insurance license is an asset
- Ability to work independently as well as on a team
- Experience using Naviplan or other financial planning software.

What Three60 will offer you:

Three60 offers a close-knit team environment, good work-life balance, competitive compensation based on your experience, and a commitment to your personal growth and development in the financial planning industry.

How to Apply

Please submit your resume and cover letter by email to: admin@three60wealth.ca

While we appreciate the interest of all applicants, we will only be replying to those who are selected for an interview.