Unconventional Wisdom

Insights From Experience On Building Financial Security

<u>Financial Plan Strategist/Creator</u>

As Canada’s Top Financial Planning Team, our "One plan - One planner" and “Full Service” philosophy means we look after all aspects of our clients' finances. The core mandate of our Practice is detailed financial planning (not sales) and very rewarding in making a big difference in our clients' lives.

If you are a Certified Financial Planner (CFP) with experience preparing professional financial plans, care deeply for people, work well in a team, and have an entrepreneurial mindset, this is a rare opportunity. Work together with Ed Rempel as part of a boutique financial planning team and provide comprehensive financial planning advice primarily to existing clients.

We are seeking an individual to add to our team on a long-term basis. Full training on our financial planning process, investment methods and unique tax strategies will be provided.

Our environment provides lots of opportunity to define your own role within our team and your specific area of expertise. Hours can be flexible and will include evening and/or weekend client meetings.

Qualifications:

Successful completion of the CFP program
Experience preparing “custom/bespoke” professional financial plans

We are looking for people who have/are:

- High sense of ethics with a focus on doing what is right for our clients
- Passionate about financial planning
- Detail-oriented and very accurate
- Creative in developing financial plans using our unique tax and investment strategies
- Commitment to detail and an ability to develop complex financial plans
- Strong focus on comprehensive financial planning, rather than an emphasis on selling products
- Outgoing & exceptional people skills
- Exceptional computer skills
- Committed to continuing education and personal development
- A team spirit looking for a long-term career
- Entrepreneurial (not a 9-to-5 person)

NOTE: This is not a commission or sales position. You are not expected to find your own clients.

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Role Overview:

- Financial planning meetings with clients. Typically 4-5 hours long.
- Brainstorm, draft and write detailed financial plans (typically 10 pages custom-written plus schedules) based on the entire life cycle of the client’s journey including:

  Financial Values
  Financial/Retirement Goals
  Assessment of Current Income & Expenses
  Detailed Retirement Plan
  Brainstorming optimal strategies to achieve their goals
  Overview of Tax minimization methods & strategies
  Overview of Insurance & Estate Planning
  Overview of Dream/Emergency Fund Requirements
  Create Written Financial Plan to Maximize and Achieve all Objectives

- Work with clients to implement their Financial Plan and on-going regular reviews to help them achieve their life goals.

Qualifications/Skills:

- Comprehensive knowledge of topics related to financial planning
- Self-starter with an entrepreneurial spirit
- Results-oriented mindset
- Exemplary written and verbal communication skills
- Strong interpersonal aptitude
- Ability to maintain confidentiality
- Experience with financial planning software
- Advanced Microsoft Excel skills

Compensation:

Competitive base salary and bonus depend on qualifications.
Industry-leading benefit plan.

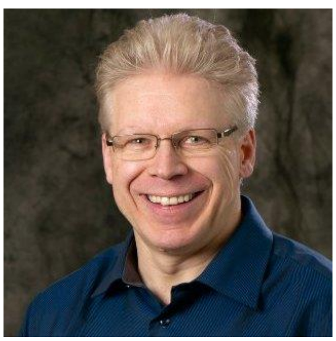
Apply in confidence via e-mail to Timothy Chisholm at tjc@chisintl.com

About Unconventional Wisdom…

We are a boutique team of financial planners together serving over 300 clients from our office in Brampton, Ontario. We are one of a very short list of financial planners in Canada that provide professional written financial plans for all our clients. We are known for our "One Plan - One Planner" comprehensive approach, an investment philosophy focusing on All Star Fund Managers and “Index Plus” investing, experts in retirement income and several effective tax & investment strategies such as the “8-year GIS Strategy”, Smith Manoeuvre & Rempel Maximum, tax strategies for business owners, and combining financial planning with personal coaching.

#1 financial blog in Canada for a full service financial planner.

- Top 15 Personal Finance Blogs in 2020 (Feedspot)
- 60 Money Influencers in Canada in 2020 (Hardbacon)
- 40 Money Influencers in Canada (Feedspot)



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