AdvisorBridge

Financial Planner Opportunity
Downtown Toronto

Located in Downtown Toronto, our client is a boutique Investment Management Firm registered with the Ontario Securities Commission as a Portfolio Manager, Investment Fund Manager and Exempt Market Dealer.

They currently have an excellent opportunity for a client facing Financial Planner with an existing practice to join their team.

Your Qualifications

- Certified Financial Planner®, Registered Financial Planner or Chartered Financial Analyst designation.
- Insurance Licensed.
- At least 5 years in a client facing role providing financial planning services.
- Existing book of business.
- Able to be registered with the OSC as an Associate Advising Representative or Advising Representative.

Your Responsibilities

- Meet with clients and complete comprehensive financial plans as required.
- Assess estate planning and insurance needs and provide recommendations.
- Client communications - responding to inbound inquiries as well as making proactive outbound contacts.
- Business Development - building referral networks through existing client base as well as through other sources.

Your Unique Qualities

You thrive in an environment where your primary responsibilities are building and maintaining strong client relationships. As a professional you act in your clients best interests as a fiduciary. You value working as part of a team where each individual provides their own unique contribution to client success.

More about our Client

Our client is an award winning OSC registered discretionary portfolio management firm with over 25 years in business. The working environment is both entrepreneurial and professional where the approach to wealth management is one that is team based and integrated.

Compensation

Negotiable based on qualifications, experience and AUA/AUM transitioned.

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www.AdvisorBridge.ca | info@AdvisorBridge.ca | 1-888-530-3888