Job title: Associate Financial Planner
Branch name: Assante Vancouver Centre, an independent branch of Assante Financial Management Ltd.
Branch location: Downtown Vancouver
Contact: corp@assante.com
Application Close Date: January 21, 2022

Job description

Assante Vancouver Centre is a premier wealth management firm located in downtown Vancouver. With over 30 years in the industry, our branch offers our clients a personalized and comprehensive planning experience.

One of our highly professional and successful MFDA practice teams is looking to bring on an Associate Financial Planner to work alongside the Senior Planner in servicing their clients. This is a tremendous opportunity for a career-oriented person in the financial services industry looking to join a full-service financial practice. The successful candidate will be mentored to help develop more advanced advisory skills, with the goal of taking on a primarily client-facing role at the right pace.

This is a full-time position with a competitive compensation and benefits package.

Responsibilities

- Play an integral role as part of a team with the Financial Planners and administrators
- Assist in the completion of required materials and tasks before, during and after client meetings
- Attend client meetings with financial planners when required
- Engage clients on a regular basis by handling incoming and outgoing calls to provide client service & support
- Assist in the preparation of financial plans, portfolio and insurance reviews and tax preparation
- Serve as a support to the Administrator for form preparation, statement requests and other administrative requirements
- Liaise and assist with our client's professional advisors including lawyers, accountants and brokers
- Maintains a strong understanding of industry regulations, policies & procedures, and compliance requirements. Keeps the team prepared for upcoming changes

Other Responsibilities (not limited)

- Organize data, information and files in Microsoft OneNote and Salesforce CRM
- Maintain client tracking spreadsheets
- Help coordinate and attend client, networking or industry events
- General admin duties

Qualifications

- Minimum of three years of related work experience in financial services
- Preference given to someone who worked in a similar role of client servicing and financial planning
- Working knowledge of investment products and vehicles

Skills and Abilities

- A highly-motivated individual and the willingness to learn through practical, technical and educational formats
- High interest in career development and taking on more advisory responsibilities as the opportunity arises
- Strong and professional communication skills both written and verbal
- Strong multitasking skills with the ability to prioritize high urgency/sensitive items
- Ability to obtain a high level of accuracy and a strong attention to detail
- Team oriented – Helpful, encouraging and supportive personality
- Understanding of back office procedures and compliance in a MFDA environment
- Strong computer and technical skills in a Windows/PC environment
- Highly proficient in Word, Excel, Outlook and SalesForce

Education/training

- Post-secondary education (preference for Finance/Business focus)
- CIFC, IFC or CSC successfully completed preferred (able to be licensed)
- CFP or at a minimum be enrolled and on track to completing preferred

We thank all applicants for their interest; however only those selected for an interview will be contacted.