

RAYMOND JAMES®

FINANCIAL PLANNER

Calgary, AB or Edmonton, AB or Vancouver, BC
Job Posting # 21-065

Raymond James Ltd. is seeking a qualified Financial Planner to work in our corporate Retirement & Financial Planning team. Raymond James Ltd. is one of Canada's leading independent investment dealers offering high quality investment products and services to Canadians seeking customized solutions to their wealth management needs.

The Financial Planner is responsible for providing financial planning services to Raymond James' wealthiest clients (over \$1M in investable assets) in collaboration with their Financial Advisors. The ideal candidate is a **career** Financial Planner with ample experience understanding the needs of business owners and high net worth individuals and illustrating plans for these clients using NaviPlan. A great working knowledge of advanced financial and tax planning concepts is a must.

Specifically you will:

- Prepare and deliver financial plans for clients with complex financial situations, including conducting client plan presentations on a case by case basis;
- Provide ongoing, professional financial and tax planning advice on planning strategies to Financial Advisors;
- Review written pieces, blogs, newsletters and slide presentations prepared by advisory teams with a goal to assist the compliance department in evaluating the content for accuracy;
- Develop professional relationships with local external experts (i.e. professional accountants, lawyers etc.) to provide comprehensive service on complex planning matters;
- Prepare and present internal and external workshops and seminars on various current topics relating to financial planning;
- Write articles for internally and externally directed publications, related updates, and maintenance of the Advisor web resource library;
- Maintain financial planning professional practice standards including training, development and codes of conduct;
- Update a database of clients currently going through the financial planning process and manage such process from beginning to end; and
- Other duties as assigned.

To qualify for this opportunity you possess:

- An undergraduate degree in Commerce or a related field is an asset;
- Minimum of two years of experience in the Investment Brokerage or Financial Services industry;
- Comprehensive technical understanding and execution of the financial planning process including investments, asset protection, retirement, estate planning, cash management and taxation issues;
- At least one year of dedicated financial planning experience subsequent to obtaining the CFP® or Financial Planner (F.PI) designation;
- Additional designations including Life Insurance license and/or CA/CMA/CGA/LLB are a definite asset;
- Excellent proficiency with NaviPlan or similar planning application;



- Written and verbal fluency in English at a business level is required;
- Excellent verbal and written communication skills;
- Proficiency with MS Office, particularly Excel;
- Experience with Dataphile is an asset;
- Well-developed interpersonal and customer service skills;
- Ability to work within deadlines in a high-volume, pressure oriented environment;
- Ability to prioritize and manage multiple deadlines and tasks;
- Ability to exercise tact and discretion, as well as handle confidential information;
- Meticulous attention to detail; and
- Advanced problem solving skills.

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

Short-listed applicants will be required to complete a financial planning case in order to be considered for this position.

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting #21-065 by July 16, 2021 to:**

Human Resources
Raymond James Ltd.
E-mail: resumes@raymondjames.ca

To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company, including but not limited to a credit and criminal record check. Employment is contingent on the satisfactory completion of a pre-employment background check.

We sincerely thank all applicants who express an interest in this role: only those being directly considered will be contacted.

Raymond James Ltd. recognizes the value of a diverse workforce and appreciates the unique skills and special contribution of each employee. We are committed to accessibility for candidates through all stages of the recruitment process. Should you require accommodation, please contact Human Resources via email at resumes@raymondjames.ca. We will work with you to meet your needs.

