

RAYMOND JAMES®

FINANCIAL PLANNER/ SALES ASSISTANT- IFS JAKUPI

IFS – London, ON
Job Posting# 21-023

Tall Oak Private Wealth, an independent agency of Raymond James Ltd that provides wealth management services to high net worth individuals and their families, is seeking a qualified Financial Planner / Sales Assistant to work in our London Ontario office.

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. Our full-service approach focuses on developing individualized and independent financial strategies aimed at reducing taxes, protecting assets and accumulating wealth.

As Financial Planner / Sales Assistant your duties will include client relationship management, and financial planning and administrative support to Tall Oak Private Wealth financial advisors and their clients.

Specifically you will:

- Support financial advisors by reviewing reports, following-up on client inquiries and requests to ensure appropriate account maintenance; booking client meetings;
- Liaise with various departments for execution of client requests and problem solving and other branch duties as assigned;
- Provide a high level of customer service on the phone and when responding to client inquiries and ensure that client needs are met or exceeded;
- Design and deliver financial plans of varying complexity that clearly communicate the recommendations and alternatives related to the client's financial analysis and comprehensive plan design;
- Participate in client plan presentations in the office or over the phone as requested by the FA;
- Provide ongoing, financial planning support to Financial Advisors by responding to their queries in a timely manner;
- Support planning applications such as NaviPlan, PlanPlus Planit, Razor, and Ativa Concept Toolkit as required, including training and troubleshooting for FAs and their employees;
- Write articles for internally and externally directed publications related to financial, income tax, retirement, and estate planning topics;
- Review and assess financial plans prepared by other financial advisors directly providing planning services to their clients;
- 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 workshops and seminars on various current topics relating to financial planning;
- Maintain financial planning professional practice standards including training, development and codes of conduct; and
- Coordinating marketing activities on behalf of several financial advisors as requested;
- Perform project-based work and a variety of routine office duties as required.



- Be involved in preparing correspondence and reports, servicing clients' general day-to-day requests, and other general office duties.

To qualify for this opportunity you possess:

- Strong organizational skills and meticulous attention to detail;
- High level of professionalism; Ability to prioritize, multitask, and work within time constraints;
- Two years of industry related experience preferred;
- Post-secondary education;
- Excellent Proficiency with Microsoft Office particularly Word, Excel, PowerPoint and Outlook;
- Excellent verbal and written communication skills; and
- Ability to work in a team environment and demonstrate a professional and friendly manner.
- CFP designation preferred

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

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 21-023 by June 30, 2021 to:**

Mehendi Kamani
Raymond James Ltd

Email: mehendi.kamani@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 us using the above details and we will be happy to help.

