RAYMOND JAMES®

SENIOR FINANCIAL PLANNER PART-TIME (No Sales) - IFS JAKUPI

IFS – London, ON
Job Posting# 21-025

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 to work in our London Ontario office.

As an independent team of Raymond James Ltd., Tall Oak Private Wealth in London Ontario is part of a leading independent wealth management firm, offering professional investment management and financial advisory services to high net worth individuals, medical professionals & successful business owners. We provide our clients with strategic financial planning and discretionary portfolio management services.

This position requires an energetic, ambitious and driven investment professional. The successful candidate must have a meticulous attention to detail, possess a positive attitude, excel at critical thinking, and have superior organizational skills.

This part-time, pure financial planning position (no sales) is for professionals that have a passion for helping clients reach their life goals.

The Financial Planner is responsible for providing advanced financial planning services to Raymond James' high net worth clients in collaboration with their Financial Advisors (FAs). The candidate must have experience preparing complex financial plans with a strong background, in the financial services industry. A great working knowledge of advanced financial, tax, and estate planning concepts is a must. In order to maintain an objective financial planning process to meet our clients' best interests, this is a salaried position which does not include compensation for sales.

Specifically you will:

- 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 Financial Advisors;
- Provide ongoing, financial planning support to Financial Advisors by responding to their queries in a timely manner;
- Support planning applications such as NaviPlan, PlanPlus, 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

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- Other duties and responsibilities as assigned.

To qualify for this opportunity you should possess:

- Certified Financial Planner (CFP®) or Registered Financial Planner (R.F.P.) designation in good standing;
- Minimum of five years of dedicated financial planning experience subsequent to obtaining planning designation;
- Comprehensive technical understanding and execution of the financial planning process including investments, asset protection, retirement, estate planning, cash management and taxation issues;
- Ability to incorporate the financial needs and goals of a client into a succinct, professional document outlining their options;
- Ability to organize, manage, and track multiple detailed tasks and assignments with frequently changing priorities in a fast-paced work environment while providing a high level of customer service in a calm, courteous, and professional manner;
- Excellent proficiency with at least one comprehensive financial planning application, including NaviPlan, PlanPlus, or FP Solutions;
- Proficiency with MS Office and in particular Excel;
- Well-developed English inter-personal skills to interact effectively with and guide Financial Advisors and their clients on various planning options; and
- Ability to work independently, under limited supervision, in a location separated from other national team members.

This is a part-time position with a competitive compensation package.

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 21-025 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.