RICHARDSON GMP

Position Title	**Financial Planner**
Location	Calgary
Reporting To	Vice President, Tax & Estate Planning – Wealth Strategies
Job ID	TEP - 009

Position Overview

The Financial Planner will work collaboratively with the professionals in the Tax & Estate Planning team, as well as Investment Advisors and Insurance Consultants, to prepare comprehensive financial plans for High Net Worth clients. This is a salaried role with no sales component.

Our tax and estate planning professionals work directly with clients and their advisors to translate complex financial situations into efficient and practical action plans to meet the client's retirement and estate planning goals. Through in depth discovery and face to face conversations, we identify planning opportunities that could improve a client's financial future.

Duties and Responsibilities

To be able to prepare, understand and communicate detailed financial projections (including net worth, cash flows and income tax) and advanced tax planning strategies to team members, Investment Advisors and clients.

This will include the following:

- Work directly with clients and collect the necessary information and documentation required, often in face to face meetings
- Utilize financial planning software to develop financial projections and financial plans
- Review wealth plans for accuracy
- Summarize a client's situation, analyze alternate solutions, and communicate financial planning opportunities
- Prepare written tax and financial planning strategies and educational material within the context of the comprehensive wealth plan
- Provide tax and financial planning information in response to face to face, telephone and e-mail inquiries from Investment Advisors
- Deliver training and best practices to Investment Advisors on the use of financial planning software, and foundational financial planning strategies
- Deliver presentations to large groups of clients and advisors on various topics
- Develop and write client friendly education articles on timely financial planning topics

Education

- Undergraduate degree
- Completion of Financial Planning designation (CFP, RFP, or PFP), or other appropriate designation
- Detailed knowledge of corporate and individual taxation in Canada

Qualifications

- 5 years of direct client work in the completion and delivery of financial plans a key asset
- Excellent understanding of Canadian Income Taxes and Insurance Strategies
- Knowledge and familiarity with use of Financial Planning Software, such as Naviplan, FP Solutions, PlanPlus, etc.
- Exceptional attention to detail/accuracy

- Analytical skills and ability to suggest alternate solutions to complex problems
- Strong interpersonal skills
- Excellent verbal and written communication skills
- Advanced knowledge and use of Microsoft Word, Excel and Power Point
- Strong organizational skills
- Ability to work independently and as part of a team
- Demonstrated experience working with High Net Worth clients is preferred