RICHARDSON GMP

Position Title	**Financial Planner, Tax & Estate Planning**
Location	Calgary, Winnipeg or Edmonton
Reporting To	Vice President, Western Region, Tax & Estate Planning
Position Overview	The Financial Planner will work collaboratively with the professionals in the Tax and 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 multi-disciplinary team of experts uses an integrated approach to planning. We develop customized recommendations and strategies in an unbiased and professional manner to address the complex tax, financial, philanthropic, estate, insurance and business succession needs of our clients.
Duties and Responsibilities	To be able to prepare, understand and communicate detailed financial projections (including net worth, cash flows and income tax) to team members, Investment Advisors and clients. This will include the following: • To collect the necessary information and documentation required from clients • Utilize financial planning software to develop financial projections • Review wealth plans for accuracy • Summarize a client’s situation, analyze alternate solutions, and communicate the financial planning opportunities • To prepare written tax and financial planning recommendations within the context of the comprehensive wealth plan • Provide tax and financial planning information in response to telephone and e-mail inquiries from Investment Advisors
Education	• Undergraduate degree • Completion of Financial Planning designation (CFP, PFP) • Detailed knowledge of corporate and individual taxation in Canada • Additional accreditation/proven knowledge in other professional areas such as will and trust planning, pensions and retirement planning, insurance planning
Qualifications	• 7 years or more work experience in a relevant field • Advanced knowledge and use of Microsoft Word, Excel and Power Point • Excellent understanding of Canadian Income Taxes and Insurance Strategies • Demonstrated experience working with High Net Worth clients preferred • Knowledge and familiarity with use of Financial Planning Software • Strong interpersonal skills • Excellent verbal and written communication skills • Attention to detail/accuracy • Strong organizational skills • Analytical skills and the ability to suggest alternate solutions to complex problems • Ability to work independently and as part of a team