



Position Title **Financial Planning Analyst, Tax & Estate Planning**

Location Toronto

Reporting To Vice President, Tax & Estate Planning – Wealth Strategies

The Analyst will work collaboratively with the professionals in the Tax and Estate Planning group, as well as Investment Advisors and Insurance Consultants, to prepare comprehensive financial plans for High Net Worth clients.

Position Overview

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.

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:

Duties and Responsibilities

- Supporting the financial planning team in the Tax & Estate Planning group and collect the necessary information and documentation required from clients
- Utilize financial planning software to develop financial projections
- Complete and review financial plans for accuracy
- Summarize a client's situation, analyze alternate solutions, and communicate the financial planning opportunities
- 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
- Support advisors on best practices in utilizing Naviplan financial planning software

Education

- Undergraduate degree
- Completion of or working towards completion of Financial Planning designation (CFP, RFP, PFP) or other appropriate professional designation

Qualifications

- Advanced knowledge and use of Microsoft Word, Excel and Power Point
- Good understanding of Canadian Income Taxes and Insurance Strategies
- 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
- Demonstrated experience working with High Net Worth clients preferred