Financial Planner – Vancouver

WHO WE ARE

Odlum Brown Financial Services Limited is a wholly owned subsidiary of Odlum Brown Limited (Odlum Brown) that provides financial planning, retirement, tax and estate planning, and insurance products exclusively to Odlum Brown clients.

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for over 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant, ever-evolving culture that we have built over the years. These values are the cornerstone of our culture and the principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers – all with diverse backgrounds and experiences to share from around the globe. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. A recipient of a Canada's Volunteer Award from the Government of Canada, we are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

We have an opportunity for a Financial Planner to join our award-winning firm in the Vancouver office.

WHAT YOU'LL DO

This role reports to the Manager, Financial Planning and Education, and works closely with our Financial Planning team. You will work in a collaborative environment to prepare and peer-review financial plans and projections using leading software. You will help train Financial Planners that are embedded within advisory teams on financial planning and projection software. The ideal candidate is a diplomatic team player and critical thinker with exceptional attention to detail, who provides exemplary service.

RESPONSIBILITIES

- Supervise and participate in the production and review of financial plans
- Build on existing resources to train Investment Advisors, Investment Assistants and Financial Planners on various aspects of the financial planning life cycle, with a focus on creating financial projections and plans using NaviPlan and other projection software
- Collect and analyze information based on clients' financial goals
- Prepare financial projections for clients of the firm using leading software and customized reports
- Communicate with colleagues and clients, exercise good judgement and relationship-building skills in a professional services environment
- Share best practices for gathering and inputting client information into planning tools, reviewing projection reports and interpreting results
- Explain rules and concepts to team members relating to personal and corporate income tax, registered and non-registered accounts, trusts and estates, pensions and government benefits
- Evaluate effectiveness of training and recommend changes for continuous improvement

KNOWLEDGE AND EXPERIENCE

- CERTIFIED FINANCIAL PLANNER® (CFP®) certification or an equivalent financial planning designation, together with a minimum of five to seven years post-designation experience using financial planning software
- Strong understanding of decumulation strategies from a tax perspective
- Experience with NaviPlan is preferred and experience with Conquest, RazorPlan or FP Solutions is an asset
- Familiarity with modelling trust and private corporation assets in financial projections is an asset
- Advanced proficiency in MS Office (Word, Excel, Outlook, Teams and PowerPoint)
- Self-starter and continuous learner with the capacity to work within a team, along with flexibility and willingness to assist others
- Ability to work efficiently and accurately with a sharp eye for detail
- Aptitude for reviewing clients' priorities and assumptions and making recommendations
- Client service focused and committed to exceeding expectations
- Strong verbal and written communication and presentation skills
- Team player with a proven track record of building trusting and productive relationships

WHAT WE OFFER

A culture of openness, collaboration and respect is foundational to our firm. We are a diverse, driven group of individuals who genuinely care about one another and encourage and appreciate each other's contributions. We believe in rewarding team members and do this by providing a competitive total rewards package that is fair and equitable; mentorship programs; flexible work options; and a variety of professional development opportunities to expand your career. This role has an expected salary of $80,000 – $95,000/year, plus the potential for bonuses.

Our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this role, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **June 7, 2024**.

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.