Position Posting

**Specialist, Financial Planning, Canaccord Genuity Wealth & Estate Planning Services**
**Toronto – Job #5354**

**Summary:**

Through its principal subsidiaries, Canaccord Genuity Group Inc. (the “Company”) is a leading independent, full-service financial services firm, with operations in two principal segments of the securities industry: wealth management and capital markets.

Since its establishment in 1950, the Company has been driven by an unwavering commitment to building lasting client relationships. We achieve this by generating value for our individual, institutional and corporate clients through comprehensive investment solutions, brokerage services and investment banking services.

The Company has Wealth Management offices located in Canada, the UK, Guernsey, Jersey, the Isle of Man and Australia. Canaccord Genuity, the international capital markets division, operates in North America, UK & Europe, Asia, Australia and the Middle East.

Our Canadian operation, Canaccord Genuity Corp., is currently looking for a motivated individual to join our team in Toronto. As an integral member of the Wealth & Estate Planning Services team, the role of the Financial Planning Specialist is to increase High Net Worth (NHW) client business by providing comprehensive financial plans to attract & retain business. This will be achieved in part by leveraging the business of our Canaccord Genuity Wealth Management’s Investment Advisors (IAs), deepening client relationships by providing high quality advice *a*nd identifying opportunities for additional client services on the Wealth & Estate Planning platform.

To be successful in this role, the ideal candidate will require excellent communication skills combined with the ability to prioritize and manage a complex workload. They will actively promote the benefits of our Wealth & Estate Planning Services and will be responsible for maintaining ongoing relationships with Advisors and their clients alike, training and revenue generation. The successful candidate will follow a comprehensive financial planning framework, while adhering to Canaccord, FPSC and Insurance Council of ON compliance and regulatory requirements.

This position reports to the Managing Director, Platform, Products & Services. Domestic travel may be required for this role.

**Responsibilities:**

**Client Support & Advisory Relationships:**

- Simplify complex strategies for Investment Advisors (IAs) to assist with building our affluent and emerging High Net Worth clients;
- Work with our national team of Wealth & Estate Planning Specialists to:
    - Prepare comprehensive wealth plans to address advisor/client specific needs or concerns in the areas of financial, investment, retirement, risk management and estate planning;
    - Personalize each wealth plan to provide expert knowledge around challenges affecting emerging affluent clients, such as: holding companies, employee stock options, individual pension plans, retirement compensation agreements, spousal loans, charitable giving, etc.;

- Deliver presentations to IAs and clients on specific topics related to financial, retirement, insurance and estate planning solutions, to maintain and retain Canaccord Clients, and attract new assets through promoting plans to drive the business;
- Present appropriate Insurance Strategies to clients, in the context of personal debt coverage, tax strategies within a corporation, or with regards to long-term Estate planning;
- Maintain ongoing relationships with IAs and their clients in a team context;
- Liaise with external stakeholders including Accountants, Canaccord's Charitable giving partner CIS, Local Insurance Wholesalers and Estate Lawyers to support our HNW client needs.

**Business & Program Development:**

- Maximize partnerships and synergies between departments by maintaining an understanding of Canaccord Genuity Wealth Management's products and services and directing Investment Advisors to the correct Wealth & Estate product and services;
- Generate ideas and participate in the development of projects that will enhance client service and generate fee based and insurance revenues;
- Act as a liaison between IAs, Branch Managers and the Wealth & Estate Planning Group.

**Training & Support:**

- Provide IAs with support on our Financial Planning software Naviplan;
- Promote the use of Naviplan to IAs and increase their proficiency by providing one-on-one and group training sessions.
- Provide support to Insurance Licensed Advisory teams as needed.

**Skills & Qualifications:**

- Completion of the Certified Financial Planner (CFP) designation;
- ON Insurance Licensed;
- 5 years of relevant experience in all aspects of financial planning; complex financial planning experience required;
- Investment industry knowledge is an asset;
- Experience with planning software: Naviplan an asset;
- Strong knowledge of Microsoft Office (Word, Excel, PowerPoint);
- Excellent verbal and written communication skills, with strong presentation skills;
- Ability to work effectively and independently in team environments;
- Proven networking and client acquisition skills, with the ability to cultivate strong partner relationships.

Canaccord Genuity Corp. welcomes and encourages applications from all qualified individuals including persons with disabilities. We will provide reasonable accommodations upon request for candidates taking part in all aspects of the recruitment and selection cycle.

Qualified applicants are invited to submit a resume and covering letter including salary expectations. All applications will be held in strict confidence.

Upon offer, candidates are required to show proof of citizenship, permanent residence or eligibility to work in Canada with no restrictions.

We wish to thank all candidates for their interest but only those applicants selected for an interview will be contacted. Thank you for your understanding.