



Associate Financial Planner

Mallard Wealth Advisors

Location: Saskatoon, Saskatchewan (Full Time, Employee, In Office)

About Us

Welcome to Mallard Wealth Advisors (“**Mallard Wealth**”), a Saskatoon-based wealth management firm providing comprehensive financial planning and investment advice to individuals and families across Western Canada. We are a locally rooted, advisor-led practice known for long-term client relationships, thoughtful planning, and a high standard of professionalism.

Mallard Wealth combines the personalized, relationship-driven feel of a boutique firm with the strength, tools, and regulatory support of a national wealth management platform through Assante Financial Management Ltd. This structure allows our team to deliver sophisticated, integrated planning while remaining deeply connected to the people and communities we serve.

The Associate Financial Planner role supports the practice of Tanis Robertson, Senior Wealth Advisor at Mallard Wealth Advisors, who has been advising clients in Saskatoon since 1996. Tanis is known for her steady, thoughtful approach to planning and the long-term, trust-based relationships she builds with her clients. She often describes her work as “family financial planning for when you have outgrown your bank.”

Joining Mallard Wealth means working in an environment that values care, clarity, and follow-through - where relationships matter, conversations extend beyond the numbers, and team members take pride in helping clients navigate real life decisions with confidence and trust.

Job Description (What You'll Do):

The Associate Financial Planner plays a pivotal role in delivering high-quality financial planning and advisory services.



You'll translate detailed client conversations and planning decisions into clear, accurate financial plans, analyses, and implementation steps, acting as the primary bridge between the Senior Wealth Advisor and administrative support.

Planning work may span retirement savings and income planning, tax and estate considerations, education funding, insurance and risk management, debt structuring, and investment strategy, depending on client needs. In short, you will enable smooth execution of planning work, support a strong client experience, and contribute to the continuity and growth of the practice.

You'll receive structured onboarding within our administrative and processing workflows, building a strong foundation before expanding your planning responsibilities over time.

This role does not involve business development or client acquisition, and all advice and recommendations are delivered under the supervision of the Senior Wealth Advisor.

Responsibilities (How You'll Do It):

- Attend client meetings with the Senior Wealth Advisor to understand client goals, decisions, and planning context
- Draft financial plans, projections, and scenario analyses based on client meetings
- Translate planning decisions into clear, actionable implementation steps
- Coordinate with administrative support to ensure required documentation and processing are completed accurately
- Review plans with the Senior Wealth Advisor, refine based on feedback, and maintain up-to-date client planning files
- Respond to internal and client inquiries related to planning work
- Monitor progress on active plans and contribute to quality, compliance checks
- Identify workflow improvements and contribute to planning best practices
- Support ongoing client relationships through regular planning updates, maintenance, and follow-through
- Participate in client discussions related to markets, portfolio updates, and planning adjustments, with appropriate advisor oversight
- Help ensure client plans remain current as life circumstances, goals, and market conditions evolve



In Your First Year (What You'll Focus On)

- Learning the Senior Wealth Advisor's planning approach and client base
- Building confidence and consistency in plan preparation and follow-through
- Establishing strong working rhythms with administrative support
- Increasing independence and responsibility over time

Requirements (You Must Have):

- Active mutual funds or securities license (MFDA or CIRO/IROC), eligible for immediate registration with Assante Financial Management Ltd.
- University degree or equivalent post-secondary education
- Personal Financial Planner designation or completion of Certified Financial Planner Level 1, with intent to continue toward certification
- 1 - 3 years of hands-on experience in a financial planning or advisory support role
- Strong technical foundation in financial planning, including cash flow, retirement planning, tax considerations, insurance, and investment strategies
- Demonstrated ability to prepare financial plans, projections, and scenario analyses with accuracy and sound judgment
- Comfort interacting with clients in a professional setting, including participating in meetings and supporting guidance-level discussions
- Excellent organizational skills, with the ability to manage multiple client files, timelines, and priorities without losing detail
- High attention to accuracy, compliance, and follow-through in a regulated financial services environment
- Willingness and ability to work closely with administrative support to ensure smooth planning execution
- Professional maturity, discretion, and credibility, paired with a warm, personable, and empathetic approach in both client-facing and internal interactions. You genuinely enjoy building relationships, listening with care, and engaging with clients and colleagues in a way that feels thoughtful, respectful, and human.
- The availability to work standard office hours during the week

Bonus Points (You Might Have):

- University degree in finance, economics, business, or a related field
- Certified Financial Planner designation completed or actively in progress beyond Level 1
- Previous experience working in a dealer environment



- Experience sitting in on client meetings and gradually taking on more responsibility over time
- Exposure to comprehensive financial planning areas including retirement savings and income planning, tax strategies, debt structuring, asset allocation, education planning, and risk management and insurance solutions
- Experience working in a boutique or advisor-led practice rather than a large team or call-centre model
- Comfort using planning software, CRM systems, and emerging tools including AI-enabled tools, used thoughtfully and in accordance with firm and dealer compliance requirements.
- Interest in long-term growth within an advisory practice, including deeper client involvement over time

Beyond credentials, this role is best suited to someone who:

- Enjoys translating client conversations into concrete plans and action
- Takes pride in follow-through and doesn't need constant oversight to move work forward
- Values relationships and connection, and understands that many client conversations involve listening, empathy, and continuity - not just technical execution
- Is comfortable being a bridge, not just between people, but between ideas and execution
- Is confident enough to support client guidance, but thoughtful enough to know when to escalate
- Wants to grow professionally within a stable, planning-led advisory practice

Success in This Role Means (What You Will Achieve)

- Client meeting outcomes are consistently translated into accurate financial plans and follow-through
- Planning work moves forward smoothly after meetings and supports a seamless client experience
- Administrative support receives clear direction, reducing unnecessary escalation
- The Senior Wealth Advisor's time is freed up for strategic and client-facing work
- You demonstrate growing independence and deeper planning involvement over time



- Clients experience continuity, responsiveness, and confidence knowing their planning is actively maintained and thoughtfully supported between meetings

Within Our Firm:

- We build long-term relationships with our clients and focus on thoughtful, customized financial planning that reflects their lives, goals, and values. We take the time to truly understand what matters to the people we work with and believe trust is built through care, clarity, and follow-through.
- We work as a close, collaborative team in a respectful and inclusive environment. Everyone plays an important role, we support one another, and we value clear communication and shared accountability in how we show up for our clients and each other.
- We take pride in our professionalism, precision, and attention to detail. Financial planning requires care and accuracy, and we approach our work thoughtfully, knowing the responsibility that comes with helping clients make important decisions.
- We are always learning and evolving. We value curiosity, thoughtful use of technology, and creating opportunities for team members to grow their skills, confidence, and responsibility over time.

Base Compensation: A range of \$85,000 - \$100,000, depending on experience, credentials, and readiness for the role.

Total Compensation May Include:

- Extended Health & Dental Plan Coverage
- Employer-matching RRSP Program
- Paid vacation and statutory holidays
- Underground parking in downtown Saskatoon
- Culture-aligned flexibility, including seasonal schedule adjustments where possible

Compensation is designed to reflect the responsibility and impact of the role, with opportunities for growth as experience, confidence, and contribution increase over time.



How to Apply (Come Join Us!):

If you're ready to make a meaningful next step in your career and join our team, we'd love to hear from you. Please submit your resume and cover letter to tanya@tanyabuddcpa.ca. In your cover letter, please explain why you are interested in this position and how your experience and skills make you a suitable candidate for the role.

We are looking for strong, diverse, and supportive team members to help build out the organization and as such, we welcome everyone to apply.

Deadline for Applications: Friday, February 6, 2026