Job Title: Lead Servicing Financial Planner – Private Wealth
Location: Ottawa, ON (In-Person)
Job Type: Full-time
Compensation: Competitive Base Salary + Performance Bonus + Equity Participation

The Opportunity

Grandmaster Financial Planning is an Ottawa-based independent Private Wealth firm partnered with Canada's fastest-growing independent IIROC/PM dealer (projected growth from $15B to $21B AUM by mid-2026).

We are seeking an experienced **Lead Servicing Financial Planner** to take ownership of an existing book of clients. This is **not a sales role**. This is a pure planning and relationship management role for a professional who wants to escape quotas and focus entirely on client success.

Why Join Us?

- **Institutional Firepower:** We run a specialized "Pension-Style" portfolio model (~30% Private Equity, Private Credit, Real Estate). You will offer your clients access to institutional managers like **Blackstone, Blue Owl, Goldman Sachs, and AQR**—strategies typically reserved for UHNW families, but available to all our clients through our unique structure.
- **Zero Sales Quotas:** Your mandate is simple: **Retention, Consolidation, and Referrals.** No cold calling. No "product of the month" pressure.
- **Elite Support Structure (1:1:1):** You will not be an island. Our model pairs you with **one dedicated Associate Advisor AND one dedicated Admin**. You focus on the client relationship; we handle the paperwork and scheduling.
- **No Manual Trading:** Our Portfolio Managers (7 CFAs) handle all investment decisions, trading, and rebalancing centrally. You will never waste days manually rebalancing accounts again.
- **Meaningful Equity:** We offer **Equity Participation** in the book you manage (5-7 year vesting). We are looking for a long-term partner who wants to share in the profits they help protect.

Your Responsibilities

- **Own the Relationship:** Act as the primary point of contact for an assigned book of households, conducting regular reviews and deep-dive financial planning.

- **Holistic Planning:** Deliver comprehensive financial plans (Retirement, Tax, Estate, Insurance) to ensure clients are fully protected and on track.
- **Asset Consolidation:** Identify opportunities to consolidate client assets by demonstrating the value of our private pension-style portfolios.
- **Client Retention:** Build trust and deliver "Grandmaster" level service to ensure multi-generational client loyalty.

The Team Environment

You will join a young, ambitious, and fully bilingual team of 19 professionals, including **11 Portfolio Managers**. We have 25 years of specialized expertise dominating the public sector pension planning niche in Ottawa. We are "all-in" on growth and innovation.

Qualifications

- **CFP® or Pl.Fin Designation Required.** (QAFP may be considered with significant experience).
- **LLQP (Life License) is highly preferred.** (Candidates without it must be willing to obtain it).
- **Minimum 5 years of experience** in financial planning or relationship management.
- **Bilingualism (English/French) is mandatory.**
- Strong knowledge of tax planning, retirement strategies, and investment principles.
- A "Service First" mindset—you love helping families, not hitting sales targets.

How to Apply

If you are ready to leave the bureaucracy for a role where you have true autonomy and institutional backing, we want to hear from you.

To Apply: Please send your resume to **hr@grandmasterfp.ca** with the subject line *"Lead Servicing Planner Application."* All applications will be kept strictly confidential.

Grandmaster Financial Planning is an equal opportunity employer. We thank all applicants for their interest, but only those selected for an interview will be contacted.