**Title:**
**Financial Planner (CFP®) – Fully Remote | Blueprint Financial**

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**Company:**
Blueprint Financial

**Position:**
Financial Planner (CFP®)

**Looking for:**
CFP® Professional

**City:**
Remote (Anywhere in Canada)

**Province:**
Remote

**Contact Name:**
Christopher Liew

**Contact Email:**
info@blueprintfinancial.ca

**Application Deadline:**
July 20, 2025

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## About Us

At Blueprint Financial, we are building one of Canada's leading all-digital financial planning firms. With nearly 30,000 YouTube subscribers and over 3 million views, we generate warm leads from Canadians actively looking for trustworthy, modern advice.

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## Opportunity Overview

We are hiring one full-time and up to two part-time Certified Financial Planners. This is a chance to grow your client base, work remotely, and join a dynamic team that puts clients first.

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## Why Join Us

**Leads Ready to Talk**
We provide warm inbound leads from our content. These clients already know who we are and are looking for help. You will spend less time prospecting and more time planning. No cold calling needed.

**Remote Work with Full Flexibility**
Work from anywhere in Canada. Set your own hours and manage your calendar like a business owner.

**Be Part of a Real Team**
Collaborate with a growing, close-knit group of CFAs, CFPs, and CPAs—not a stuffy old-school firm, but a dynamic startup-like culture that values innovation, technology, and transparency.

**Personal, Corporate, and Cross-Border Planning**
You will work with a mix of households, business owners, and Canadians planning international moves. We support clients with both domestic and cross-border needs, including tax, investment, retirement, and insurance strategies.

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## What We're Looking For

- Certified Financial Planner (CFP®)
- Confident leading virtual meetings from start to close
- Able to explain complex financial topics clearly and build trust
- Comfortable using planning tools such as Snap Projections, Conquest, or similar software
- Proactive, organized, and strong with follow-through
- Comfortable with warm sales and knows how to close planning engagements
- Strong knowledge of taxes, retirement planning, and investments
- CPA or corporate planning experience is a bonus

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## Responsibilities

- Meet with prospective clients from our inbound funnel through virtual meetings
- Build trust, uncover goals, and close new planning engagements
- Create detailed financial plans covering investments, insurance, taxes, and retirement
- Use planning software to model client scenarios and recommendations
- Follow up with leads and manage a growing pipeline of clients
- Collaborate with a supportive, transparent, and experienced team
- Help shape the future of financial advice in Canada

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## Compensation and Hours

**Full-Time**

- $70,000 to $100,000 (includes base pay and performance-based bonuses)
- Set own hours, 40 hours per week

**Part-Time**

- Commission-only structure with strong lead flow
- Flexible hours and fully remote work

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## How to Apply

If you are a skilled planner who wants to help Canadians live better financial lives, we want to hear from you.

Apply with your resume and a short message to:
info@blueprintfinancial.ca