

HODGKINSON & ASSOCIATES ONTARIO INC- THE CO-OPERATORS

10 SUNSET BLVD., PERTH, ON K7H 2Y2

613-267-6417

hodgkinson_associates@cooperators.ca

Position: ASSOCIATE FINANCIAL PLANNER

Salary: Negotiable – (Range \$70,000-\$90,000 depending on experience and qualifications)

Summary:

The Associate Financial Planner plays a key role in supporting and developing agency operations through outbound prospecting, client contact and sales activities. This role may have an opportunity to specialize in one or more product areas such as life, group and wealth. The Associate Financial Planner will identify prospects in both personal and business markets, determine needs and make informed product recommendations. They may also be involved in the development and growth of personal lines products (home/auto insurance) and specialty lines (farm and/or commercial) portfolios.

Roles and responsibilities:

- Support development of the agency operation through the sales and profitable growth of life, group and wealth management products.
- Service and support the life, group and wealth management portfolio of the agency while adhering to compliance rules and regulations for the sale of life insurance and wealth management products.
- Proactively complete client reviews focusing on life and wealth management products.
- Prospect and cross sell all lines of business by completing needs analysis for clients in accordance with the agency Business Plan.
- Complete front-line risk assessment and selection, following underwriting guidelines.
- Complete home, commercial and farm inspections as required.
- Achieve individual goals for client service, sales, quality and productivity and contribute to the achievement of overall agency sales and growth goals.
- Develop annual marketing plans outlining strategies and activities to meet goals in each product area of responsibility.
- Support programs to build multi-client relationships.
- Respond to and investigate client questions and concerns, resolve client complaints and escalate issues appropriately.
- Support the agency team in their daily activities.

Working Conditions:**Physical:**

Regular office environment with some evening work required and some travel outside of the office. Willing to work flexible hours.

Qualifications and Skills:

- The ideal candidate will be an active member of FP Canada and registered as a Qualified Associate Financial Planner® professional or Certified Financial Planner® professional.
- Life License and/or Mutual Fund License is required.
- General or other Insurance License(s) are an asset.
- Meet all provincial-licensing requirements in accordance with continuing education to obtain and maintain all licenses and professional memberships.
- A minimum of two (2) years experience in the financial services industry.
- Knowledge of insurance products and strong underwriting skills is an asset.
- Strong skills in communication (verbal and written), organization, time management, client service, decision making, problem solving.
- Candidate must be comfortable in a technology dependent environment including proficiency with Microsoft Office.
- Valid drivers license may be required.
- The successful candidate shall be subject to a Criminal Record and Consumer History background check as a condition of employment.

Full Time Permanent Position

Job posting will remain active until the successful candidate has been chosen.

Please forward resumes by email to: hodgkinson_associates@cooperators.ca with subject line reading – Job Ad Associate Financial Planner.

Date Posted: November 18, 2025