



DAVID COOKE
WEALTH COUNSELLORS

Associate Financial Planner

Located in Mississauga, Ontario, David Cooke Wealth Counsellors is an owner managed firm serving households across Ontario. In addition to our unique planning models, we offer clients professional insurance planning and investment portfolio management that is unmatched in the retail advisory space. Over 24 years we've fostered deep client relationships that have rewarded our company. We are building our team to enhance our offering.

The Associate Financial Planner will work alongside firm principals to prepare comprehensive financial plans for mid to high-net-worth clients with an emphasis on tax efficient and reliable retirement income planning.

Duties and Responsibilities

- Prepare and communicate detailed financial projections (including net worth, cash flows and income tax) and advanced planning strategies for our target clientele.
- In depth insurance planning strategies
- Assume advising and servicing of a portfolio of our existing clients, insurance and investment planning.
- Be the planning resource to principals and other advisors in the firm.
- Attract, plan for, and service your own clientele under the firm's umbrella

Qualifications

- 3-5 years of direct client work in the completion and delivery of financial planning and advice.
- Excellent understanding of Canadian Income Taxes and Insurance Strategies
- Knowledge and familiarity with use of Financial Planning Software
- Exceptional attention to detail/accuracy
- Strong interpersonal skills, excellent verbal and written communication skills
- Knowledge and use of Microsoft Word, Excel and Power Point

Education

- Undergraduate degree
- Completion of Financial Planning designation (CFP, CLU) or other appropriate designation, LLQP licensed
- Working knowledge of corporate and individual taxation in Canada

Details:

- Competitive base salary with revenue sharing and bonuses based on activity and performance.
- Office location in Mississauga, Ontario. Some off-site client visits, flexibility to work part time remote.