



## Associate Planner/Administrator

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 Planner will work alongside firm principals to deliver comprehensive planning and advice to our growing clientele.

### Duties and Responsibilities

- 40% of your time is providing administrative and client service support to firm clients and principals. Your operational experience in a planning or financial services environment will assist here.
- 40% providing planning and advice to a portfolio of our existing clients, insurance and investment planning.
- 20% attract and build 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.
- Knowledge and familiarity with use of Financial Planning Software, general office computer skills, compliance.
- Exceptional attention to detail/accuracy
- Strong interpersonal skills, technical ability, excellent verbal and written communication skills

### Education

- Undergraduate degree
- Preference given to those with CFP, CLU designations and LLQP licensed

### 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.