Who We Are

We are the Financial Design Team - an approachable, positive, close-knit group of financial professionals associated with Sun Life Financial and located in Barrie, Ontario. We guide professionals, business owners and their families across Simcoe County and Muskoka through life transitions to help them build meaningful and financially secure lives. Every person's life is different, and we love helping clients bring all the pieces together in a way that makes sense for them - like designing a mosaic that reflects their unique story.

Who You Are

We're looking for an **Associate Advisor** to join our growing team. This is a great opportunity for someone who's motivated, people-oriented, and eager to grow in the financial planning field. In this role, you'll support the Principal Advisor and help grow our client base while continuing to provide the personal, thoughtful service our clients count on. Over time, you'll take on more responsibility in developing new business and strengthening client relationships, all while helping create smooth, positive experiences for the people we serve.

Qualifications and Skills

- MFDA's CIFC (required)
- LLQP Life License (preferred) or willing to obtain within 6 months
- PFP, CFP, or QAFP designation is an asset
- Proven experience in selling investment and insurance products
- Strong sales ability and a genuine desire to help people achieve financial well-being
- Entrepreneurial spirit, self-motivated, energetic, and results-driven
- Friendly, professional, and personable demeanor
- Excellent communication skills, both verbal and written
- Strong organizational, time management, and multi-tasking abilities
- Comfortable in a dynamic, fast-paced environment

- Capacity to build trust-based relationships and adapt to changing client needs

Key Responsibilities

Client Servicing

- Manage and review existing investment portfolios
- Proactively assess clients' changing needs and update plans accordingly
- Deliver exceptional service and deepen client relationships
- Free up the Principal Advisor’s time by supporting top-tier client strategies
- Assist in maintaining relationships with prospects and centres of influence

New Client Acquisition

- Actively identify and pursue new clients
- Leverage personal and professional networks (natural market)
- Generate referrals and seek client introductions
- Build and maintain relationships with Centres of Influence (e.g., CPAs, mortgage brokers)
- Attend client events, tradeshows, and other marketing activities
- Collaborate with other team members as needed

Financial Planning

- Conduct thorough financial reviews and retirement projections
- Identify key issues, goals, and financial opportunities
- Input and analyze data using financial planning software
- Prepare and present personalized planning solutions to encourage client action

Product Solutions

- Implement financial plans through tailored product solutions
- Recommend investment, insurance, and wealth management strategies
- Create and analyze investment portfolios, leveraging Morningstar tools
- Market and manage insurance solutions (life, CI, disability, segregated funds)
- Ensure documentation is complete and compliant with regulatory standards

Professional Development

- Engage in a tailored onboarding and training program
- Learn and adopt the firm’s best practices, processes and advisory approach

How to Apply

If you're someone who finds meaning in helping others feel more confident and clearer about their financial future, we'd love to hear from you.

Employment is contingent on the satisfactory completion of a pre-employment background check conducted by Sun Life Financial. Financial Design Team welcomes and encourages applications from all qualified individuals including persons with disabilities. We will provide reasonable accommodations upon request for candidates taking part in all aspects of the recruitment and selection cycle.

Qualified applicants are invited to submit a resume and cover letter to kim@thepersonalcoach.ca.   All applications will be held in strict confidence.