



# MODERN VISION PLANNING

## Company Description

**Modern Vision Planning** is driven by a bold vision: to inspire and evolve a new generation of financial planners who will redefine how individuals approach and achieve financial well-being. Guided by our commitment to “service above self,” we work side by side with our clients, championing their goals and building lasting partnerships. Together, we’re not just planning for the future—we’re creating it, helping every client unlock their potential and build a brighter, more secure financial tomorrow.

An award-winning firm, recently announced as Readers’ Choice 2025 Winners in Mississauga for:

- Best Financial Planning Services
- Best Financial Advisor
- Best Mortgage Broker/Advisor
- Best Insurance Agent/Broker

## Role Description

Step into a career where your ambition and expertise truly matter! As a remote commissioned financial services associate, you’ll have the opportunity to forge powerful client relationships, deliver impactful financial guidance, and craft personalized strategies that help people achieve their dreams. This is more than a job—it’s an entrepreneurial journey where your success is rewarded through uncapped commissions, performance bonuses, and profit sharing. If you’re driven to make a difference and thrive in a fast-paced, rewarding environment, this is your chance to build your own business and shape the financial futures of those you serve.

## Qualifications

- Strong analytical, research, and data interpretation skills
- Entrepreneurial mindset and drive to build a business.
- Proven ability to meet KPIs in a fast-paced environment.

- Exceptional communication, writing, and presentation abilities
- Client relationship management and customer service experience
- Knowledge of financial planning principles, products, and strategies
- Problem-solving skills and the ability to work collaboratively
- Proficiency in Microsoft Office Suite and financial analysis tools
- A bachelor's degree in finance, business, economics, or a related field is preferred but not required.
- Preference will be given to those with existing licenses or designations: Canadian Securities Course (CSC) or Canadian Investment Funds Course (CIFIC), Life License Qualification Program (LLQP), Certified Financial Planner (CFP), or Chartered Professional Accountant (CPA) and/or willing to obtain additional industry qualifications.
- Previous experience in financial services or consulting is an advantage