Financial Planner

Parallel Wealth Financial Group

About the Position

We're looking for a Financial Planner to join our team at Parallel Wealth! In this role, you'll support Fee-for-Service clients—building personalized retirement and estate plans, offering clear advice, and helping Canadians feel confident in their financial future. If you enjoy client-focused planning and want to be part of a collaborative, values-driven team, this could be a great fit.

Key Focus Areas

Plan Creation: Prepare financial plans and scenarios using Snap Projections.
Plan Presentation: Present plans via Zoom in a clear, professional, and personal manner.
Plan Delivery: Provide clients with a final plan report, following our internal standards and training.

The Role

We're hiring an experienced Financial Planner to join our fee-based planning team. You'll work with clients on a transactional basis, delivering comprehensive retirement and estate plans that provide clarity, direction, and long-term tax efficiency.

Responsibilities

- Prepare and present financial plans that help clients achieve their retirement goals
- Build plans from start to finish using client-provided data, ensuring accounts work together for clarity and tax efficiency
- Deliver a confident and supportive experience for all Fee-for-Service clients with help from the Parallel Wealth team
- Educate clients and answer all questions to ensure clarity, satisfaction, and long-term understanding

Our Ideal Candidate

We're looking for a passionate team player who aligns with our planning philosophy. The ideal candidate thrives in a client-facing role, can manage their workflow independently, and is motivated to deliver a high-quality client experience.

Requirements

- 8+ years of experience in financial planning
- CFP designation (required)
- CLU designation (an asset)
- Experience with Snap Projections (an asset)
- Excellent communication and interpersonal skills

What We Offer

- Fully remote role – collaborate and meet clients via Zoom
- $90,000 – $100,000 base salary + performance-based bonus
- Comprehensive benefits, including:
- Dental & vision care
- Extended health care
- Wellness program
- RRSP matching
- Tuition reimbursement
- Paid time off & flexible schedule
- No evenings or weekends
- Business casual dress

About Parallel Wealth

Parallel Wealth has two key focuses: education and planning. Through our YouTube channel, we've connected with clients across the country, providing retirement and estate plans for Canadians aged 45+ who are looking for clarity and direction. Our planning dives deep into registered account meltdown strategies, government benefits, pensions, corporate drawdowns, and rental property planning. The goal is simple: help clients maximize their spending and minimize taxes over their lifetime.

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