Unconventional Wisdom

Insights From Experience On Building Financial Security

Apply in confidence via e-mail to Timothy Chisholm at tjc@chisintl.com

Financial Planning Administrative Associate

About Our Client:

Join one of Canada's most dynamic fee-for-service financial planning teams and become an integral part of a client-focused, boutique financial planning practice. Our "One Plan - One Planner" and "Full Service" philosophy ensures we manage all aspects of our clients' financial lives with a strong focus on comprehensive financial planning, not product sales. Our work is deeply rewarding, making a significant impact on our clients' financial well-being.

If you have strong organizational skills, care deeply for people, work well in a team, and have an entrepreneurial mindset, this is a rare opportunity. Work together as part of a boutique financial planning team and assist in providing comprehensive financial planning advice to existing clients.

We are seeking an individual to add to our team on a long-term basis. Full training on our financial planning process and unique tax strategies will be provided. Our practice is busy, so we will give you preference if you are confident and fast-paced, but accurate.

Our environment provides lots of opportunity to define your own role within our team and your specific area of expertise. Hours can be flexible and will include evening and/or weekend client meetings.

Job description

We are seeking a highly organized and detail-oriented Financial Planning Administrative Associate to support our Financial Planners in delivering exceptional service to our clients. This role is primarily administrative, with a need for foundational knowledge in finance and tax concepts to effectively assist in client service and planning processes. You will play a key role in managing client data, preparing financial documents, and ensuring smooth operational workflows within the practice.

Key Responsibilities:

- Provide administrative support to Financial Planners.
- Prepare and organize client meeting materials and reports.
- Maintain accurate and up-to-date client records in CRM systems and filing systems.
- Assist with data entry and financial analysis for client review meetings (training provided).
- Manage scheduling and coordination of client meetings.
- Communicate professionally with clients to address inquiries and follow up on action items.
- Support the implementation of tax strategies and financial planning recommendations.
- Handle general office administration tasks to ensure smooth daily operations.

NOTE: This is not a commission or sales position. You are not expected to find clients.

This is not an investment or insurance role. It is personal financial planning advice.

We are looking for people with:

- High sense of ethics with a focus on doing what is right for our clients
- Strong administrative and organizational skills with attention to detail.
- Basic understanding of financial planning concepts and tax strategies.
- Excellent written and verbal communication skills.
- Proficiency with Microsoft Office Suite (Excel, Word, Outlook) and comfort with CRM systems like Salesforce.
- Ability to prioritize tasks and manage multiple deadlines in a fast-paced environment.
- A proactive, team-oriented mindset with a commitment to client service excellence.
- Entrepreneurial (not a 9-to-5 person).
- Post-secondary education in business, finance, or related fields is an asset.

Compensation:

Compensation will be determined based on your experience, skills, and fit for the role. We are committed to offering a competitive package that reflects the value you bring to our team. We also offer an industry-leading benefit plan.

About this company

We are a boutique team of professional financial planners serving a Canada-wide contingent of over 400 clients from our office in Mississauga, Ontario. We are one of a very short list of financial planners in Canada that provide professional written financial plans for all our clients. We are known as experts in retirement planning, retirement income planning, several effective tax & investment strategies such as the Smith Manoeuvre, Lifecycle Investing & Rempel Maximum, tax strategies for business owners, our "One Plan - One Planner" comprehensive approach, an investment philosophy focusing on All Star Fund Managers and “Index Plus” investing, and combining financial planning with personal coaching.

- Ed Rempel is rated #44 in Money Influencers in Canada 2024 by Hardbacon (https://hardbacon.ca/en/financial-independence/top-money-influencers-in-canada/).

- Our blog www.edrempel.com is rated the #17 Canadian Personal Finance Blog for 2024 by Feedspot: (https://finance.feedspot.com/canadian_personal_finance_blogs/).

For further information or if you know someone that is perfect that we should speak with please contact:

Timothy J. Chisholm

Principal & Managing Director

Chisholm & Partners International Inc.

tjc@chisintl.com

www.linkedin.com/in/timothyjchisholm