



Indigenous.Link

Canada's fastest growing Indigenous career portal, Careers.Indigenous.Link is pleased to introduce a new approach to job searching for Indigenous Job Seekers of Canada. Careers.Indigenous.Link brings simplicity, value, and functionality to the world of Canadian online job boards.

Through our partnership with Indigenous.Links Diversity Recruitment Program, we post jobs for Canada's largest corporations and government departments. With our vertical job search engine technology, Indigenous Job Seekers can search thousands of Indigenous-specific jobs in just about every industry, city, province and postal code.

Careers.Indigenous.Link offers the hottest job listings from some of the nation's top employers, and we will continue to add services and enhance functionality ensuring a more effective job search. For example, during a search, job seekers have the ability to roll over any job listing and read a brief description of the position to determine if the job is exactly what they're searching for. This practical feature allows job seekers to only research jobs relevant to their search. By including elements like this, Careers.Indigenous.Link can help reduce the time it takes to find and apply for the best, available jobs.

The team behind Indigenous.Link is dedicated to connecting Indigenous Peoples of Canada with great jobs along with the most time and cost-effective, career-advancing resources. It is our mission to develop and maintain a website where people can go to work!

Contact us to find out more about how to become a Site Sponsor.

Corporate Headquarters:

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Job Board Posting



Careers.Indigenous.Link

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Financial Planning Associate - 12-Month Contract

Job ID	198898-en_US-3389	
Web Address	https://careers.indigenous.link/viewjob?jobname=198898-en_US-3389	
Company	Scotiabank	
Location	Toronto, ON	
Date Posted	From: 2024-05-27	To: 2050-01-01
Job	Type: Full-time	Category: Finance

Description

Requisition ID: 198898

Join a purpose driven winning team, committed to results, in an inclusive and high-performing culture. Purpose of Job: The primary purpose of the Financial Planning Associate is to provide Regional support to Scotia Wealth Management advisors and Specialists. The Associate is also required to work very closely with other members of the Team of Specialists during plan preparation.

Accountabilities: 1. Proactively support the planning needs of Wealth Advisors and Relationship Managers by:

- Preparing plans submitted by Wealth Advisors and Relationship Managers
- Inputting client data from documents submitted into the WealthPrint software
- Working with Advisors to create a Total Wealth Plan that addresses their clients' immediate and future goals and objectives
- Providing alternative scenarios or solutions when clients are unable to meet goals
- Identifying and communicating referral opportunities to advisors by completing Executive Summaries and Action Plans
- Acting as liaison between Team of Experts and Advisors
- Ensuring that all plans assigned are accurate and completed in a timely manner pursuant to the Service Level Agreement

Education/Work Experience/Designations:

- In-depth understanding of the comprehensive financial planning process including investments, asset protection, retirement, estate planning and tax issues.
- College or University degree
- Working towards CFP
- Excellent Computer Skills (Word and Excel)
- Excellent interpersonal and telephone skills
- Client facing role where you would have the opportunity to provide financial advice
- Conquest software experience

Location(s): Canada : Ontario : Toronto

Scotiabank is a leading bank in the Americas. Guided by our purpose: "for every future", we help our customers, their families and their communities achieve success through a broad range of advice, products and services, including personal and commercial banking, wealth management and private banking, corporate and investment banking, and capital markets.

At Scotiabank, we value the unique skills and experiences each individual brings to the Bank, and are committed to creating and maintaining an inclusive and accessible environment for everyone. If you require accommodation (including, but not limited to, an accessible interview site, alternate format documents, ASL Interpreter, or Assistive Technology) during the recruitment and selection process, please let our Recruitment team know. If you require technical assistance, please click here. Candidates must apply directly online to be considered for this role. We thank all applicants for their interest in a career at Scotiabank; however, only those candidates who are selected for an interview

will be contacted.

For more information, visit [Scotiabank for Financial Planning Associate - 12-Month Contract](#)