



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:

Toll Free Phone: (866) 225-9067

Toll Free Fax: (877) 825-7564

L9 P23 R4074 HWY 596 - Box 109

Keewatin, ON P0X 1C0

Job Board Posting



Careers.Indigenous.Link

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ScotiaMcLeod Senior Financial Planning Associate - Rosedale

Job ID	200712-en_US-8351	
Web Address	https://careers.indigenous.link/viewjob?jobname=200712-en_US-8351	
Company	Scotiabank	
Location	Toronto, ON	
Date Posted	From: 2024-06-25	To: 2050-01-01
Job	Type: Full-time	Category: Finance

Description

Requisition ID: 200712

As a cornerstone business within Scotia Wealth Management, ScotiaMcLeod has earned a reputation for integrity based on service excellence and trusted investment advice. Our advisors and teams pride themselves on exploring innovative approaches to protecting and growing their clients' assets.

When you join ScotiaMcLeod, you'll be empowered to deliver Enriched Thinking, a unique approach that incorporates your client's thinking, as well as our thinking, to drive results. You'll work with a team of specialists to deliver a client-centric approach to wealth management, enabling you to consider all the facets of your client's life, family and business. With a focus on total wealth planning, and wealth specialists to help you deliver on this unique value proposition, you'll be enabling clients to see not just the big picture, but all the little ones too.

PURPOSEThe primary purpose of the Senior Financial Planning Associate is to provide financial planning support to a dedicated Wealth Advisor team in preparing and delivery of personal financial plans to the Advisor's clients.

WHAT YOU'LL BE DOINGIn this role you will: Champion a customer focused culture to deepen client relationships and leverage broader Bank relationships, systems and knowledge.

Proactively support the financial planning needs of the Advisor's assigned clients which include a deep discovery with the client to uncover goals and objectives, preparing, presenting the plan

Proactively support the financial planning needs of advisors by:

Build financial plans that address 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

Contribute to the ongoing professional practice by participating in monthly Total Wealth Planning calls

Provide general support to Wealth Advisor and team by providing updates on financial planning trends and strategic recommendations that may benefit their clients

Champion a high-performance environment and contribute to an inclusive work environment.

DO YOU HAVE THE SKILLSWe would love to work with you if you have:

- CFP Designation required
- In-depth understanding of the comprehensive financial planning process including investments, asset protection, retirement, estate planning and tax issues
- College or University degree
- Proficient with Microsoft Office suite, specifically Word and Excel
- Advanced understanding of financial planning software; ability to model complex strategies and workarounds to incorporate new changes and legislations
- Experience in Total Wealth Planning engagement from client discovery, plan preparation to presentation delivery
- Experience in a client facing role with opportunity to provide financial advice
- Canadian Securities Course and/or Life Insurance License is an asset

WHAT'S IN IT FOR YOU

- At ScotiaMcLeod we help employees build their futures – where they can be themselves, and win together. With a commitment to diversity and inclusion and a performance-oriented culture that includes coaching, learning, and development – there are endless possibilities. At ScotiaMcLeod– you can make an impact. You help make the futures of our 25 million customers happen. You can find your future here.

- The opportunity to join a forward-thinking organization where you are surrounded by a collaborative team of innovative thinkers.

- An organization committed to making a difference in our communities– for you and our clients.

- An inclusive working environment that encourages creativity, curiosity and celebrates success.

- Learning and Development – free access to Scotia Academy to upskill and develop your skills

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 ScotiaMcLeod Senior Financial Planning Associate - Rosedale](#)