



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

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Job Board Posting



Careers.Indigenous.Link

Date Printed: 2024/06/30

Financial Planner - Trenton, Belleville, Peterborough

Job ID	201291-en_US-3737	
Web Address	https://careers.indigenous.link/viewjob?jobname=201291-en_US-3737	
Company	Scotiabank	
Location	Belleville, ON	
Date Posted	From: 2024-06-27	To: 2050-01-01
Job	Type: Full-time	Category: Finance

Description

Requisition ID: 201291

Join a purpose driven winning team, committed to results, in an inclusive and high-performing culture. As a Financial Planner, you will focus on developing and deepening client relationships by providing high quality advice and service within the mass affluent market. Most importantly, you realize that your clients are your greatest asset, and your priority is providing investment and financial planning advice to help them meet their unique goals. Following a comprehensive financial planning framework, you will be focused on investment sales and new client acquisition, as well as establishing business development opportunities with prospects and clients within the assigned market area.

Promote the development and sustainable growth of proprietary investment business in the assigned market area by:

- Conduct in-depth reviews for assigned clients including retirement planning, wealth accumulation and estate planning utilizing financial planning skills and tools to support our clients' financial goals.
- Natural curiosity to uncover and solve for client's needs, deliver trusted financial advice to clients regarding their investments and retirement planning.
- You're self-directed, performance oriented in your approach in discovering our clients needs, listening to understand what they are looking for, customized financial strategies and solutions.
- Be highly engaged, educate clients, provide relevant insights and expert advice.
- Demonstrate a collaborative approach when dealing with peers, clients, and partners.
- Build relationships, focusing on providing a great client experience and growing long-standing relationships with existing clients.

Do you have the skills that will enable you to succeed in this role We'd love to work with you if you have:

- Experience in financial planning and investment sales is preferred.
- Successfully completed the Personal Financial Planning (PFP) designation and/or a Certified Financial Planner (CFP) designation.
- You're a mutual funds certified professional. You have current accreditation and good standing for MFDA licensing requirements (Investments Funds in Canada or Canadian Securities Course).
- You're goal oriented and entrepreneurial. You can work independently as a self-motivated entrepreneur with minimal supervision and as part of a larger team.
- Knowledgeable of competitive offerings, market trends, economic conditions, and the regulatory environment.

What's in it for you

- A competitive compensation and benefits package that rewards growing and maintaining your client base.
- Access to leading-edge resources to support your growth including dedicated marketing support, powerful mobile technology, leading CRM, portfolio, and financial planning software.
- The ability to build long-lasting client relationships through exceptional advice and service.
- A work culture that promotes diversity, respect, and inclusion.
- An organization committed to making a difference in our communities for you and your clients.

Location(s): Canada : Ontario : Belleville || Canada : Ontario : Peterborough || Canada : Ontario : Trenton

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 Planner - Trenton, Belleville, Peterborough](#)