Financial Planner

Posted by Ameli & Associates

Posting Date : 08-Jan-2026

Closing Date : 07-Jul-2026

Location : Toronto

Salary : $61,000 - 63,000 Per Year

Job Requirements

- **Education**: Bachelor's degree
- **Language**: English
- **Years of Experience**: 3 years
- **Vacancy**: 1
- **Job Type**: Full Time
- **Job ID**: DISJ2701912

Job Description:

Location: 2 Berkeley Street, Toronto, Ontario, M5A 4J5

Description:

How does the role impact the organization?

The Financial Planner will be part of an integrated process that is dedicated to serving our clients with a higher level of service. This position is ideal for someone looking for a long-term career where they can utilize their planning skills for the benefit of the clients we serve on behalf of an expanding client base.

What will your role be responsible for?

•€€€€€€€ Prepare comprehensive financial plans with capacity to develop analysis and strategies to address material issues and opportunities.

•€€€€€€€ Participate and lead client meetings and presentations with respect to financial planning matters, issues, and reports.

•€€€€€€€ With experience and expertise in Canadian tax, provide tax insights, analysis, and oversight of professional tax services engaged by clients.

•€€€€€€€ Have a working knowledge of US/Non-Resident tax and cross boarder tax matters.

•€€€€€€€ Liaise with our other departments (tax, insurance, trust) and make note of any estate?related recommendations/to?do’s.

•€€€€€€€ Manages each client planning engagement from the initial discovery meeting, gathering client data, entering client data, working with the client’s other professional advisors, interpreting planning information and output, and generating and delivering client planning deliverable.

•€€€€€€€ Assist with projection analysis and plan management progressions.

•€€€€€€€ Support client other professionals in necessary fulfillment (i.e. tax preparation).

•€€€€€€€ Exercise tact and the utmost discretion in the handling of client private, confidential information and collaborating with their other professional advisors (tax and legal).

•€€€€€€€ Provide support for US cross boarder account management and operations with specific experience using Next 360.

What do we expect from you?

To qualify for this opportunity, you possess:

•€€€€€€€ Minimum 3 years of practical, client facing financial planning experience, including Canadian operating, professional and holding corporations, private trusts, and cross-border considerations.

•€€€€€€€€Experience preparing and delivering financial plans for HNW Canadian families in the Wealth Management industry.

•€€€€€€€€Worked with Conquest Planning Software in the last two years is mandatory.

•€ € € € € € € € €€•€€€€€€€€Experience in cross border administration/planning, ie US domiciled account systems and process. Experience with Netx360 software a benefit.

•€€€€€€€ Skilled in producing customized insurance illustrations for multiple providers, tailored to each client’s unique financial scenario.

•€€€€€€€ Experience with client-facing financial planning experience, including work with Canadian corporations, trusts, and some cross-border situations.

•€€€€€€€ Practical experience in higher level planning, comparative analysis, and recommendations.

•€€€€€€€ Good knowledge of Canadian investment structures, accounts, and related tax and succession laws.

•€€€€€€€ Knowledge in insurance, trust and estate planning, with experience working with insurance quotes, policy reviews, and analysis.

•€€€€€€€ Ability to provide tax recommendations, at both a personal, corporate, and trust level.

- €€€€€€€€ The ability to within deadlines in a high-volume and demanding environment while maintaining a high level of service and an imperative attention to detail.

- €€€€€€€€ Demonstrate advanced face-to-face, email, videoconferencing, and telephone etiquette and relationship management skills.

- €€€€€€€€ Proven experience in managing social media platforms and maintaining company websites to ensure consistent branding and optimal user experience.

- €€€€€€€€ Construct education materials, presentation, and distribution on financial planning, tax, and legacy planning matters.

- €€€€€€€€ Work independently as well as collaboratively within a team environment.

- €€€€€€€€ Proficient in Microsoft Office with a willingness and ability to learn new applications

Educational Requirements

- €€€€€€€€ Bachelor’s in accounting or finance

- €€€€€€€€ College diploma or University degree in financial planning

- €€€€€€€€ College diploma or University degree in accounting

- €€€€€€€€ Certified Financial Planner (CFP®) or in the process of completion of the CFP® designation is required.

Work hours

- €€€€€€€€€32.5 hours / week

What can you expect from us?

Our most important investment is in people. Upon eligibility, Raymond James Ltd offers a competitive compensation of $61,000 - $63,000/yr plus performance bonus (where qualified).

At Raymond James – we honor, value, respect the uniqueness, experiences, and backgrounds of all of our Associates. When associates bring their best authentic self, our organization, clients and communities thrive, it is part of our people-first culture. The Company is an equal opportunity employer and makes all employment decisions on the basis of merit and business needs.

To apply for this job vacancy, please send your resume along with a cover letter and a refrence letter from your previous employer to the following email: amelifinancial@gmail.com

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