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We're Hiring: Financial Planner (CFP® or on the path there)

We're an independent, fast-growing, client-focused wealth advisory firm based in Winnipeg. We work with **high-net-worth clients** who expect thoughtful, thorough, and personalized planning. To keep up with our growth, we're looking for a **Financial Planner** who's as excited about helping clients as we are.

This role is **hybrid** (Winnipeg-based, with flexibility), and it's all about building real client relationships and crafting plans that actually make a difference.

We want someone who

- Has (or is close to completing) their **CFP®** and has experience building financial plans.
- Is a natural people-person with client-facing experience.
- Communicates clearly and warmly (no jargon soup).
- Is collaborative, self-motivated, and growth-minded.
- Is comfortable rolling up their sleeves and handling some client service tasks when needed.

What you'll do

- Build detailed, customized financial plans that cover the big picture — retirement, tax, estate, risk, investments, and more.
- Partner with advisors to deliver seamless, high-value client experiences.
- Join client meetings and present planning recommendations.
- Support clients with follow-ups and ongoing service.
- Help us refine and grow our processes as the firm expands.

Why you'll like working with us

- We're **independent** — no product quotas, no hidden agendas.
- We're **growing quickly**, which means opportunity for you to grow too.
- Our culture is **collaborative, detail-oriented, and forward-thinking**.
- **Compensation is competitive and based on experience**, with room to grow as you prove your value.