GRK Wealth Management
Financial Planning Associate Job Posting

Description of Company and Role:

Good Redden Klosler is a fully integrated team of professional experts with extensive knowledge in accounting, advisory and wealth management services. We take pride in offering our owner-manager entrepreneurial clients comprehensive financial solutions tailored to their unique needs. It all begins with a personalized financial plan. Then, utilizing our wide array of in-house services, including investment and insurance solutions, we ensure our clients' financial goals are met with precision and care.

We are looking for a Financial Planning Associate to join our Wealth Management team. The Financial Planning Associate's primary responsibility will be to support our Certified Financial Planners® as they service their existing clientele, as well as new clients as we continue to grow. This involves working as a team, managing client relationships, ensuring effective communication throughout the crafting of the financial plan and implementation of solutions supporting our clients' financial goals.

We collaborate closely with our in-house accountants, which leads to superior outcomes for our clients. It's worth noting that this career opportunity may hold significant appeal for individuals currently working in the accounting field.

We thrive as a team at GRK, ensuring that every client meeting benefits from the expertise of a CPA, CIM, or CFP. This collaborative approach is crucial and adds immense value to our services.

The Financial Planning Associate will be based on-site at our Tillsonburg office and will occasionally attend our Simcoe office and client locations periodically. For further insights into our firm and the services we offer, please visit our website http://www.goodcas.com/

The successful candidate for this career will have:

- At least 3 years' experience providing clients with financial advice
- Have a positive attitude, internal drive, lots of energy and an entrepreneurial spirit
- A desire to help entrepreneurial families plan for their personal future as well as the future of their business
- The ability to think critically and evaluate all the data available to help clients meet their goals
- High ethical standards and a commitment to a client-first approach
- A desire to be ingrained in the business and to grow in their role towards a Certified Financial Planner® as part of a longer-term transition/succession
- Excellent communication and interpersonal skills with clients, peers, and centers of influence
- A strong ability to build relationships specifically with multi-generational planning
- Feel confident in direct client engagement and making appropriate recommendations to help clients take action
- QAFP, CFP, CIM or CPA designation, or be working towards obtaining one or more
- The LLQP license or willingness to obtain
- A professional presence and appearance
- Strong spoken and written communication skills in the English language
- Excellent technology skills including experience working with multiple software simultaneously
- Proficiency in financial planning software (Conquest) and CRM systems (Salesforce) - (an asset)
- Experience working with corporate planning - (an asset)

Key Responsibilities Include:

1. Pre and Post Meeting Preparation

- Coordinate client meetings and prepare necessary materials with the support of the administrative team.
- Prepare concepts, financial plans and supporting material or tools in advance of and during CFP® meeting by anticipating client and planner needs.
- Follow-through after meeting conclusion including ensuring all files and notes are saved to CaseWare and completing post-meeting tasks or assigning tasks to an appropriate team member.

2. **Financial Planning**
   - Gather and input client data into financial planning software.
   - Assist in creating strategies, conducting research, and preparing client reports.
   - Participate in client meetings, summarize discussions, and follow up on action items.
   - Stay updated on financial planning best practices and industry trends.

3. **Insurance Recommendations and Administration**
   - Support CFP with insurance illustrations and recommendations.
   - Review forms for accuracy, solve administrative issues, and maintain documentation.
   - Communicate with clients throughout the underwriting process.

4. **Integration of Investment Professionals**
   - Build rapport with our Portfolio Managers (PMs) at TriCert Investment Counsel.
   - Schedule meetings with an appropriate PM considering client need.
   - Review reports and explain key concepts to clients on a fact-basis.
   - Recognize opportunities and refer accordingly.

5. **Client Relationship Management (CRM)**
   - Maintain CRM (Salesforce) with up-to-date tasks, notes, and actions.
   - Respond to client inquiries professionally, providing exceptional service.
   - Engage with clients at least annually and support CFP/CPAs with onboarding of new clients.

6. **Utilization of Technology, Resources, and Tools**
   - Utilize Salesforce, Excel, CaseWare, and Outlook effectively.
   - Promote work efficiency and integrate procedures, tools, and technology.

7. **Support Other Team Members**
   - Collaborate with accounting and investment teams.
   - Provide backup support to team members as needed.

Compensation

An approximate salary range is $60,000 and $100,000 depending on experience, licensing, and designations.

Why work for GRK?

- Flexible work environment with banked time and Fridays off in the summer.
- Enjoy team lunches, retreats, parties, and more.
- RRSP matching, work perks, benefits, paid memberships, and personal development.
- Mentorship and ample opportunities for growth and increased responsibility as you become more confident, competent, and licensed.

Next Step

Please respond with a cover letter expressing your interest in joining this dynamic financial planning team. Please note that Kim Poulin of The Personal Coach is assisting us with this hire.