



Conquest Planning endeavours to improve the speed, individualization, accuracy and ongoing evolution of modern financial plans to fit every family's financial needs across life's twists and turns. Leveraging artificial intelligence (we call it SAM) to deliver personalized and prioritized financial planning strategies that will help financial advisors, and their clients see what possibilities exist for their financial future. We believe a goals-based approach to financial literacy, delivered through a human centered digital experience, will increase the number of people who can benefit from financial advice. We were founded in Canada in 2018 and went live in market in January of 2021. Since that time, we have become the market dominant software provider for financial advice delivery in that market. Conquest serves the entire wealth continuum – from simple to complex. We are based out of Winnipeg, Manitoba and have team members located across Canada, the United States, and United Kingdom.

We are seeking a **Bilingual Financial Planning Consultant** to join our dynamic team!

Reporting to the Director, Support Services, the **Bilingual Financial Planning Consultant** is responsible for driving the user adoption initiative at Conquest Planning Inc. They will be the main point of contact for end-users of Conquest Planning (e.g., financial planners and financial advisors) and will assist with questions and provide in-depth functional support on how to model a broad range of financial planning concepts in the Conquest Planning application. As part of a wider team, they will also be responsible for creating and maintaining knowledge base content, user training materials, and interactive training delivery. The **Bilingual Financial Planning Consultant** must be fluent in both English and French, and hold a Canadian recognized financial planning designation.

Duties & Responsibilities:

- Be the main point of contact for end-users of the Conquest Planning application (e.g., financial planners and financial advisors)
- Assist end-users with questions and provide in-depth functional support on how to model a broad range of financial planning concepts in the Conquest Planning application
- Deliver user training sessions and host Conquest Planning application webinars
- Promote the user adoption of the Conquest application in line with Conquest's mission and strategy
- Pro-actively drive the development and updates of training programs and supporting material, including:
 - Knowledge base articles
 - In-app guidance and help tools
 - Training videos
- Log user feedback and collaborate with the product team on an on-going basis to seek opportunities for product enhancement
- Participate in various working groups & cross-departmental projects
- Become familiar with new training and adoption techniques and platforms and continue building personal knowledge in the relevant areas
- Keep up to date with Financial Planning, industry user training concepts and adoption best practices



- Occasionally assist with translation-related tasks
- Conquest Hours of Operation: 8:00 AM – 8:00 PM EST

Qualifications:

- Must hold a Canadian recognized financial planning designation such as QAFP, PFP, CFP, F.PI.
- Exceptional written and verbal English and French communication skills
- University bachelor's degree or equivalent work experience in a Financial Services role
- Familiarity with training best practices and adoption strategies
- Strong analytical and problem-solving skills with ability to gather and analyze data
- Ability to manage and prioritize workload with competing deadlines
- Ability to work independently as well as collaboratively within a team
- Attention to detail and ability to learn and adapt

Advantageous:

- Previous experience as a paraplanner or financial planner highly beneficial
- Previous experience using financial planning technology
- Project management or business analysis experience

How you will succeed:

- By building positive and collaborative relationships with Product Management, Customer Success, Enterprise Support, and other stakeholders
- By having strong communication skills, and an empathetic can-do approach to problem resolution
- By having a genuine interest in financial planning and a passion for making advice accessible to more people
- By having an aptitude for technology and enjoy learning new concepts

What to expect:

- An inclusive culture comprised of extremely talented individuals.
- A leadership team with a proven track record of success.
- The opportunity to join a company as it expands across the globe.
- Competitive compensation and generous benefits.

How to Apply:

We're excited to learn about you and want to give you the opportunity to set yourself apart from everyone else. Along with your Resume, send us a personalized Cover Letter, Email, or Video telling us why you are interested in this job, the fintech industry, and the reason you would like to work with us.



Next steps:

If this exciting opportunity is of interest to you, please forward your application as described above with **Bilingual Financial Planning Consultant** in the subject line to Human Resources at human.resources@conquestplanning.com by **December 16, 2024**.

We thank all applicants for their interest. Only those invited for an interview will be contacted.

Conquest Planning Inc. is an equal opportunity employer. Our inclusive work environment welcomes diversity and supports accessibility. If you require accommodation at any time during the recruitment process, please contact human.resources@conquestplanning.com.