Blue Zones Financial Sol Inc.
Sun Life Financial
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Financial Planner – Building, Updating, Presenting, and Reporting on Client's Financial Plans

Are you an extremely motivated and driven person, with a strong attention to detail, who LOVES the art of helping others, continuous growth and personal development?

My name is Joel Murray and I run a Financial Planning practice called Blue Zones Financial Solutions, a subsidiary of Sun Life Financial. We help Canadians build and preserve their wealth, so they have the freedom to live their best lives while being a positive impact to future generations.

While the solutions we offer are great, it is our service and love for others that really sets us apart from the competition. At the end of the day, we want our clients to say that their Blue Zones Team are a part of the family, that has been a continuously compounding positive force on their journey to Financial Freedom.

Because we're continually growing, adding customers on a regular basis, and seeking to add value to our existing customers, we need more help. That's where you come in…

Role Summary:
You will be responsible for collaborating with and supporting the existing Advisory Team in adding value to clients with their Financial Planning and Investment Management and assisting the team with keeping clients on track for their long-term goals. You will also contribute constant improvements to the company's existing systems, processes, and client experience by leveraging various technological efficiencies.

NOTE: This position is full-time and hybrid (3-4 days in office)

What you'll be doing….

Day to day, you'll be joining the Senior Advisor in meetings with clients and prospective clients, virtually or in person to identify planning opportunities that help progress them towards Financial Independence. You will also take on the lead responsibility of building and updating financial plans using our financial planning software, to help all clients make sound financial decisions. Finally, you will assist generally with Portfolio Management and specifically with the refining of the Blue Zones Model portfolios with a focus on client outcome.

This is for you if:

- You're great with people and love helping others.
- You're upbeat, positive, full of smiles, and maybe a little quirky 😊
- You pay close attention to the details.
- You are system driven, and good at problem solving and figuring things out on your own with minimal direction… can create your own structured work environment.
- You actively read and seek out new learning from books or courses to get better at your role
- You implement. And do so with minimal direction, doing a lot of your own research to find the best way to solve the problem at hand.
- Lastly and most importantly, you're driven. You want to work hard, learn a ton, and put a smile on people's faces.

DISQUALIFIERS: **Please DO NOT apply to this position if you:**

- **Have less than 5 years of Financial Planning experience**
- **Don't have either a CFP, CFA or CPA designation**
- **Don't have the drive and ability to self motivate**
- **Have no interest in finance and self development**

If none of these things can be said of you, then please continue reading…

Outcomes/Responsibilities
30 Day Targets:

1. Life Insurance License in place
2. Learn all tech systems, company processes & product offerings to be effective.
3. Attend all client meetings with the Senior Advisor

60 Day Targets:

1. Complete 12 Financial Plans

2. Complete 12 Financial Plan Updates
3. Meet and start building relationships with various head office planning supports

90 Day Targets:

1. Design and implement reporting for CFP Planning Modules – tax planning etc
2. 100% of clients planning inquiries responded to in a timely manner
3. Implement 3 upgrades to Financial Planning & Portfolio Management Processes

KPI's

- # Financial Plans completed
- Clients taking actions & making progress.
- Results - clients achieving their goals.

Qualifications:

At Blue Zones Financial Solutions, we value work ethic, coachability, and past results.

- CFP or equivalent planning designation
- 5+ years industry experience, experience speaking directly with clients and presenting Financial Plans to clients such that they understand and proceed with your planning recommendations.
- Experience reporting on the various CFP - Financial Planning Modules
- Canadian Securities Course (CSC) and/or Mutual Funds License required.
- Life Insurance Licence is an asset
- Ability to develop long lasting, trusted relationships with stakeholders.
- Excellent verbal, communication, and presentation skills
- Natural propensity towards teamwork and collaboration; proven coachability
- Demonstrated experience and expertise with financial planning software. Experience with Conquest is an asset.

Total Compensation: Actuals depend on skill and historical results

- $115,000 - $145,000+ Depending on qualification, skills, and historical results
- Bonus – Performance based and paid upon completion of Performance metrics.
- Health & Dental Benefits Package

About Blue Zones Financial Solutions:

The Blue Zones are the areas in the world with the longest living and happiest people. Our company helps people achieve financial freedom so they can create their own blue zones lifestyle. We genuinely care about our client's success and our hope is that our clients are content in the present and maintain a positive expectation and hope for an even better future by trusting in their Plan.

About the team:

The current team is small but mighty with the lead Financial Planner and two full time team members who primarily take care of complete administration of client's Accounts and coordinating and preparing for client meetings.

All team members are A players with a love, passion, and drive to do great work, work as a team and make the world a better place.

You would have full access and leverage of an internal team that believes in working together, in and out of strengths to achieve life work balance. This extends to the support we receive from the external team that is Sun Life Head office.

Company Core Values:

1. Love for people
2. Integrity
3. Service
4. Provide Massive Value
5. Continuous Improvement
6. Efficiency

Please note that Kim Poulin of The Personal Coach is assisting our team to make this hire.