Financial Planning Support

At Castlemark Wealth Management Inc., we are always looking for talented, capable candidates wanting to secure a career in the financial services sector. If you are interested in joining an award-winning team and you have the core competencies and experience to get the job done, forward your resume to: **info@castlemarkwealth.com**

The qualified assistant provides support to the Senior Planner. Responsibilities include data gathering and analysis, assessing risk and asset allocation, development of financial plans and implementation. The Financial Planning process involves reviewing clients' personal circumstances and objectives and developing tailored strategies and solutions to meet both their short- and long-term financial needs. The ideal candidate is proactive and able to take initiative, demonstrating strong problem-solving skills and the ability to work independently in a remote setting. They should be comfortable identifying opportunities for improvement and taking the lead on tasks or projects without constant supervision, ensuring that client needs are addressed efficiently and effectively.

Core Responsibilities:

- Collaborate with the Senior Planner to create detailed financial plans, reports, and presentations for clients and potential clients, ensuring alignment with their risk tolerance, financial goals, and retirement plans.
- Gather information from clients through fact-finding processes.
- Review and analyze client reports, investment statements, and financial information to extract relevant details.
- Assess clients' financial status to identify issues and asset consolidation opportunities.
- Interpret and understand financial data effectively.
- Use financial software to input data, analyze results, and propose strategies.
- Evaluate various financial planning scenarios for clients.
- Clearly explain financial planning concepts and issues, both verbally and through integrated reports.
- Monitor clients' financial situations with precision and detail. Following up on the implementation of plan recommendations and action items.
- Engage directly with clients to implement ongoing strategies as required.
- Stay informed about financial planning and economic trends to adjust recommendations as needed.
- Continuously learn about investment and insurance products that may benefit clients.
- Safeguard the confidentiality of sensitive information.
- Deliver a high level of end-to-end personalized client service, including the rapid resolution of queries. Providing exemplary customer service with every interaction.
- Keeping up to date with the overall economic and financial environment, current events, market conditions, trends and changes to legislation and product platforms in an area that is subject to frequent change.

CASTLEMARK
WEALTH MANAGEMENT

Qualifications and Education:

- 3 to 5 years financial planning experience.
- CFP designation or working towards obtaining it.
- Knowledge of Snap projections is an asset.
- LLQP/Life and A&S Insurance license is an asset.
- Experience in data gathering and strong financial and analytical skills.
- Experience with electronic filing systems, OneDrive, SharePoint, etc.
- Excellent computer skills with proficiency in Microsoft Office (Word, Outlook, Teams including advanced knowledge of Excel).
- Effectively and efficiently manages relationships and client/team member expectations.
- Ability to maintain confidentiality and high level of integrity/discretion.
- Excellent organizational and time management skills.
- Impeccable communication and interpersonal skills (written and verbal).
- Display sound judgement and willingness to take initiative.
- Ability to work well in a team-oriented collaborative environment but can work independently with little supervision in a remote environment.
- Assist other team members as required.

Please submit resume and cover letter for consideration to info@castlemarkwealth.com