# Financial Planning Specialist

Company: Research Capital Corporation

Location: Head Office in downtown Toronto. Hybrid work model.

**Research Capital Corporation** is a leading national independent investment firm dedicated to delivering innovative financial solutions and strategic advisory services. With a strong focus on fostering long-term client relationships, we provide tailored investment opportunities, wealth management, and corporate financing solutions.

As we continue to grow, we are expanding our wealth management offering to broaden our financial planning service.

**Job description**

The Financial Planning Specialist will be instrumental in launching and leading the firm's financial planning service. Reporting directly to the firm’s President, this role involves shaping the firm’s financial planning product strategy, guiding advisors, and delivering tailored, holistic solutions to clients.

- Develop and oversee the processes for creating, approving, issuing, and retaining client financial plans.
- Evaluate, recommend, and approve financial planning software programs for use by the firm.
- Serve as the primary approver for financial plans prepared by investment advisors, ensuring compliance and alignment with client objectives.
- Collaborate with investment advisors to craft financial plans for qualified clients.
- Build and maintain partnerships with legal and accounting professionals to address estate and tax planning needs.
- Work closely with the life insurance team to identify opportunities to integrate life insurance products into financial plans.
- Ensure seamless collaboration across departments to enhance the client experience and optimize results.

**What you bring to the job**

As a seasoned professional, you possess the expertise and vision to establish and lead this pivotal function within the firm. Key qualifications include:

- Certified Financial Planner (CFP) designation.
- Extensive experience with financial planning software and tools.
- A proven track record in the securities or wealth management industry.
- Strong understanding of Canadian income tax regulations.
- Knowledge of estate planning.
- Exceptional interpersonal and communication skills to engage advisors and clients effectively.
- Experience as an investment advisor would be an asset, offering insights into client needs and advisor support.
- A forward-thinking mindset to build and scale a new service offering within a reputable firm.

Interested candidates should send their resume to **Patricia Foster** at PFoster@researchcapital.com.

We wish to thank all candidates for their interest but only those applicants selected for an interview will be contacted. Thank you for your understanding.