

Job Title: Financial Planner – Client Management & Business Development

Company Name: MDL Financial Group

Location: Casselman, ON (Hybrid)

About Us:

MDL Financial Group is a dynamic and forward-thinking financial planning firm dedicated to delivering personalized and comprehensive financial solutions. With a strong commitment to client success, we are expanding our team and seeking a Financial Planner with expertise in managing an existing book of business while being incentivized to actively bring in new clients.

Position Overview:

As a Financial Planner at MDL Financial Group, you will be a key player in our growth strategy, responsible for managing and growing an existing book of business while actively seeking opportunities to bring in new clients. This role offers a unique blend of client relationship management, strategic planning, and business development.

Responsibilities:

1. Client Management:

- Build and maintain strong relationships with existing clients, understanding their financial goals and evolving needs.
- Conduct regular reviews of clients' financial plans, ensuring alignment with their objectives and addressing any changes.

2. Business Development:

- Proactively identify and pursue opportunities to expand the client base through networking, referrals, and targeted outreach.
- Develop and implement strategies to attract new clients, meeting or exceeding business development targets.

3. Financial Planning:

- Conduct comprehensive financial assessments for clients, providing expert advice on investment strategies, retirement planning, tax optimization, and estate planning.

Qualifications:

1. Certifications and Education:

- Bachelor's degree in Finance, Business, or a related field.
- Certified Financial Planner (CFP) designation or equivalent.
- Life license (LLQP)
- Mutual funds license

2. Experience:

- Proven track record as a Financial Planner with experience in managing and growing a book of business.
- Familiarity with industry regulations and compliance.
- Comfort and proficiency with financial planning software, spreadsheets and other tools required.
- Experience with investment management and tax planning is a plus.

3. Skills:

- Strong client relationship management skills.
- Demonstrated success in business development and client acquisition.
- Excellent communication and presentation skills.
- Strong analytical skills to assess clients' financial situations, analyze market trends, and recommend appropriate strategies.

4. Motivation:

- Self-motivated and driven to meet and exceed business development goals.
- Entrepreneurial mindset with a focus on growth.
- Ability to work independently and as part of a team

5. Language proficiency:

- Bilingual proficiency in English and French is required.

Benefits:

- Competitive salary with performance-based incentives
- Health benefits
- Professional development opportunities
- Collaborative and supportive team environment

Work Arrangement:

The position will be based in-office for the first 4-6 months, after which a hybrid work arrangement may be considered based on performance and business needs.

How to Apply:

If you are a seasoned Financial Planner with a proven track record in managing an existing book of business and a passion for business development, we invite you to submit your resume and a cover letter detailing your qualifications and interest in the position to info@mdlfinancialgroup.ca. Please include "Financial Planner Application" in the subject line.

MDL Financial Group is an equal opportunity employer. We encourage candidates from diverse backgrounds to apply. We appreciate all applications, and only those selected for an interview will be contacted. Thank you for considering a career with MDL Financial Group.