



Letko, Brosseau & Associates Inc.

## Financial Planner

**Letko, Brosseau & Associates** is an investment manager with offices in Montreal, Toronto and Calgary. Founded in 1987, the firm has enjoyed strong growth as a result of excellent investment performance, attentive client service and high standards of business ethics.

As a Financial Planner, you will work closely with LBA clients on various financial planning matters such as:

- Retirement planning;
- Investment planning;
- Analysis of protection (insurance);
- Portfolio analysis and forecasts;
- Income and debt management.

In addition to assisting our clients in their financial planning, you will be involved in the development of our new client's web platform, by sharing your market knowledge and ideas.

You will also be asked to develop a bank of questions and information that will allow us to answer frequently asked questions from our clients (FAQs).

### **Main responsibilities:**

- Analyze our client's financial situation;
- Develop projections of their financial situation under various scenarios;
- Build strong customer relationships, based on trust and transparency, allowing you to follow the evolution of their needs;
- Answer client's technical questions about their financial planning.

### **Required profile:**

- Hold a Certified Financial Planner certification (CFP) and the Financial Planning Accreditation (IQPF) designations;
- Minimum of 7 years of experience in financial planning, ideally in the banking or insurance industry;
- Bachelor's degree in finance, commerce or economics;
- Canadian Securities Course (CSC), an asset.
- Bilingualism both spoken and written (English and French), essential.

### **The ideal candidate:**

- Master the legal and financial environment;
- Has an excellent analytical and synthetic mind;
- Has an ability to communicate;
- Is self-sufficient, resourceful and proactive;
- Has a rigorous, logical and methodical mind;

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- Has good writing skills;
- Listens and knows how to establish a climate of trust with the client.

## **Salary and Benefits:**

- Very attractive and competitive base salary, plus annual bonus;
- Generous medical, dental and life insurance as well as long-term disability insurance plans as of day1;
- Employer contribution to a deferred profit-sharing plan (DPSP);
- Corporate discount for your membership in a fitness center;
- Our offices are in downtown Montreal, easily accessible by public transit. Steps away from a great selection of restaurants and shops!

Our mission is to provide a supportive and inclusive environment where all individuals can maximize their full potential.

If you are interested in the challenge, please submit your resume to [\*\*careers@lba.ca\*\*](mailto:careers@lba.ca).

We thank all candidates for applying, however only those selected for an interview will be contacted.