



Financial Planner

Letko, Brosseau & Associates is one of Canada's leading independent global investment managers. Founded in 1987, the firm offers a diverse set of investment solutions to a domestic and international customer base. We believe our business-minded, fundamental research approach, strong ethical culture and client-first fiduciary commitment has been the key to our long-term growth and success. Through ongoing, active engagement with the companies we invest in, we seek to contribute to positive change, while earning superior returns for our clients.

Working closely with LBA Investment Counsellors, you will be responsible for answering client questions about financial planning, including with respect to:

- Retirement planning;
- Investment planning;
- Tax analysis and planning;
- Insurance needs analysis;
- Estate planning;
- Income and debt management.

In addition to offering comprehensive financial planning to clients, you will contribute to the development of our client portal by leveraging your market knowledge and sharing your ideas.

You will also take part in the development of an FAQ that will answer clients' questions.

Main responsibilities:

- Analyze clients' financial situation
- Prepare and present reports with financial, tax and estate projections based on various scenarios, as well as advice
- Leverage your expertise to build solid, trusting relationships with clients in order to keep track of and meet their changing needs
- Assist Investment Counsellors with service delivery by answering clients' technical financial planning questions

Required profile:

- Financial Planner designation and IQPF diploma
- A minimum of seven (7) years' experience in financial planning, ideally in banking or insurance
- Bachelor Degree in Business Administration, Finance or any other related discipline
- Canadian Securities Course (CSC), an asset
- Bilingualism mandatory, both spoken and written (English and French)

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Ideal candidate qualifications:

- Excellent command of the financial, tax and legal environment
- Excellent analysis and synthesis skills
- Good communicator and team player
- Autonomy, resourcefulness and initiative
- Discipline, logic and method
- Good writing skills
- Active listener able to build trust
- Very good knowledge and command of technology tools

Salary and benefits:

- Highly competitive compensation plan including a bonus program and an equity participation plan
- Immediate access to medical, dental and life insurance coverage, along with short -term and long-term disability insurance
- Employer contribution to a deferred profit-sharing plan (DPSP)
- Employee & Family Assistance Programs and telemedicine
- Discount on fitness centre membership
- Our downtown Montreal office is easily accessible by public transit, with a vast array of restaurants and boutiques nearby!

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

If you are ready for this challenge, please submit your resume to johanne.tremblay@lba.ca

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