Financial Advisor

Accel Professional Corporation

Job ID
11149

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LOCATION	DATE POSTED	EXPIRY DATE
1110 Centre Street N, Suite 204, Calgary, AB| Alberta	23-10-2026	21-04-2027

TYPE OF JOB	SALARY	MIN. EXPERIENCE	MIN. EDUCATION
Full Time	CAD Hourly 40.00 - 45.00	1 year to less than 2 years	Bachelor's degree

Job Details

We, Accel Professional Corporation, are looking for a passionate Financial Advisor to join our growing team.

Position: Financial Advisor (NOC 11102)
Vacancies: 1
Employment Terms: Permanent, Full-time, Day, Morning, Afternoon
Hourly Wage: $40.00 – $45.00 (30–40 hours per week)
Work Location: 1110 Centre Street N, Suite 204, Calgary, Alberta, T2E 2R2

Duties and Responsibilities:
• Assess clients' financial circumstances, including income, expenses, assets, liabilities, cash flow, and short- and long-term financial objectives, to identify their financial planning needs.
• Develop comprehensive personal financial plans and recommend strategies related to cash management, savings, retirement planning, estate planning, and long-term financial security.
• Analyze clients' financial statements, tax records, and other relevant financial information to evaluate their financial positions and recommend appropriate financial strategies.
• Provide financial planning advice to individual clients, self-employed professionals, and business owners, taking into consideration their personal financial objectives and applicable tax implications.
• Assist clients in developing tax-efficient financial planning strategies in coordination with the firm's accounting and taxation professionals.
• Review clients' existing financial plans and recommend adjustments based on changes in their financial circumstances, personal objectives, and relevant financial or economic conditions.
• Provide guidance on estate and succession planning considerations, including financial asset management, wealth preservation, and the financial implications of transferring assets.
• Explain financial planning recommendations to clients, assist with the implementation of agreed-upon strategies, and coordinate with external licensed professionals where specialized investment, insurance, or legal advice is required.
• Maintain accurate client financial records, prepare financial planning reports, and establish ongoing client relationships through regular consultations and follow-up services.

Position Requirements and Qualifications:

• A bachelor's degree in finance, accounting, business administration, commerce, economics, or a related field is required.

• 1–2 years of experience in financial advisory services, personal financial planning, accounting, or related financial services is required.

• Strong knowledge of personal financial planning, cash flow management, retirement planning, estate planning, and Canadian taxation principles.

• Strong analytical and problem-solving abilities, with the capacity to interpret financial information and develop practical recommendations.

• Excellent interpersonal, communication, and client relationship management skills.

• Strong organizational skills, attention to detail, and the ability to manage multiple client assignments and deadlines.

• Proficiency in Microsoft Office applications and familiarity with financial planning or accounting software.

• A recognized financial planning designation is considered an asset.

• Ability to maintain confidentiality and uphold professional and ethical standards when handling sensitive client financial information.

• Any professional licensing or registration required for regulated financial advisory activities must be obtained before performing those activities.

Work Conditions and Physical Capabilities

Fast-paced environment; Attention to detail; Work under pressure

How to apply:

If you are interested in the position and would like to join and grow with us, we encourage you to send us a Cover Letter and Resume by email to accelcpa.careers@outlook.com

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