Ultra-High-Net-Worth Financial Planner

Requisition	R0000191022
Employer	RBC Dominion Securities Inc.
Canadian locations	Vancouver (Colombie-Britannique, Canada)
Primary address	745 THURLOW ST, VANCOUVER, BC V6E 3V5, Canada
Posted	November 23, 2026
Date in the description	October 22, 2026
Posted deadline	January 23, 2027
Last day to apply	January 22, 2027
Business area	WEALTH MANAGEMENT
Employment status	Regular
Work schedule	Full time · 37.5 h per week
Pay type	Salaried

The position

A chair of the RBC Dominion Securities Family Business Council is looking for an experienced and experienced financial planner to join this practice as a high-power financial planner (UHNW).

This role is part of an increasingly focused advisory team and is intended for an established professional who seeks to apply these skills in a goal-oriented, entrepreneurial consultation framework, while benefiting from the scale, brand and resources of RBC Dominion Securities.

The role is closely linked to the family business advisor to provide high value and tailor-made asset management advice and strategies to Ultra High Net-Worth and High Net Worth customers.

RBC Dominion Securities is a relationship-focused investment and wealth management firm that consistently ranks #1 in Canada. We are proud of our collaborative, supportive culture that enables success at every level and equips us to help our clients achieve their financial goals.

Responsibilities

Holistic Planning & Strategic Recommendations

- Deliver exceptional financial planning, by providing a comprehensive and white glove to high-value clients, with a focus on our most important and complex relationships
- Understand and link each client with broader family circumstances, goals, assets, liabilities, corporate structures, cash flows, taxes, estate considerations, insurance needs, succession, philanthropy and intergenerational goals and a clear financial roadmap
- Identify planning needs, opportunities, risks and gaps; develop practical and comprehensive plans covering wealth, investment, retirement, tax optimization and risk management
- Provide expertise on complex client situations, such as holding companies, stock options, individual pension plans, pension arrangements and charitable donation and donation planning

Tax, Estate & Year-End Planning

- Conduct structured financial health audits and plan the end of the fiscal year and the taxation of ultra-high value clients before the end of their fiscal year or calendar year
- Ensure that each customer benefits from the tax reduction options available to him
- Review income tax returns to identify tax planning opportunities Help clients and their accountants prepare their year-end tax, including charitable, heritage and intergenerational planning objectives

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Client Communication & Relationships

- Lead planning-focused client meetings when appropriate
- Communicate findings, strategies, alternatives and recommendations clearly and confidently, in language clients can understand
- Strengthen client relationships and loyalty through informed advice and timely action
- Provide timely and educational presentations to clients, perspectives and centres of influence on heritage management strategies and recent developments (budget changes, tax changes, etc.)

Integration & Collaboration

- Building strong professional relationships and networks with RBC Family Office specialists and external professionals such as accountants and lawyers
- Coordinate their areas of advice into a coherent wealth strategy and contribute significantly to professional discussions on behalf of clients
- Recognize opportunities for consolidation, unmet planning needs and areas where relationships can be deepened, contributing to the growth of the team's assets and revenues

How we work

Success in this role requires consistent alignment with the following operating expectations

- End-to-end ownership: Take responsibility for identification issues until the end.
- Proactivity: Predict client and team needs, identify opportunities, risks and next steps
- Presence and Commitment: Be present, accessible and fully engaged in the work. The role is to work five days a week, with reasonable flexibility for family and personal commitments
- Continuous Learning: Take personal responsibility for developing your technical knowledge, strategic judgment, critical thinking and communication skills

Qualifications

- A self-starter who thrives with autonomy and accountability
- Completed CPA designation, In-Depth Tax Program
- A minimum of 8 to 10 years of relevant industry experience
- Experience servicing High-Net-Worth and Ultra-High-Net-Worth clients
- In-depth knowledge of the principles of financial planning, taxation, succession, insurance, retirement, corporate planning and capitalization
- Strong analytical and problem-solving skills
- A holistic and grand-image thinker who questions assumptions, recognizes what may be missing and understands the implications of the client's wealth strategy as a whole.
- Exceptional interpersonal skills and emotional intelligence, builds trust
- Strong skills in written and verbal communication, can simplify complex concepts for others

Assets

- CFP designation
- A context in one of the following areas would be considered an asset:
- Senior Tax Manager with a Deemed Accounting Firm
- Similar role with another asset management company
- Senior Financial Planner
- A leading role in a well-known family office
- Other Finance Designations
- Life Insurance Designations

Pay and benefits

- A comprehensive total premium program, competitive pay and flexible benefits

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- Leaders who support your development through coaching and mentoring
- Working in a collaborative, progressive and effective team with a culture that is intentional, caring, trustworthy and disciplined
- Opportunities to do difficult work and establish close relationships with clients
- Capacity to make a difference and sustainable impact

Compensation

The salary for this position is $125,000 to $175,000 based on your experience, skills, designations, registration status, market conditions and business needs.

You have the potential to earn much more through RBC Dominion Securities' strong discretionary bonus program, which gives you the opportunity to increase your total pay, provided the company achieves its performance goals and achieves your individual goals.

RBC's compensation philosophy and principles recognize the importance of a highly qualified global workforce and play a key role in attracting, mobilizing and retaining talent that:

- RBC's High Performance Culture
- To enable the collective achievement of our strategic objectives
- Generate sustainable shareholder returns and higher market value of shareholders

Job Skills

Accounting, Accounting practices, Business development, Chartered accounting, Client centrality, Client relations, Communication, High net worth people, Investments, Long-term planning, Professional tax, Wealth management, Heritage management strategies, Heritage planning, Heritage preservation planning

RBC accepts applications until 11:59 p.m. on the day before the posted deadline.

Our Employment Opportunities

RBC works as One RBC and follows five shared values: putting clients first, integrity, collaboration, respect and excellence. As one of the world’s largest and most successful banks, it sees inclusion and different perspectives as important to continued growth. RBC supports staff in doing their best work, working together, innovating and developing professionally. Its policies and programs foster respect, belonging and opportunities for everyone to create value for clients and communities.

Talent community

People who join RBC’s talent community can receive new postings, career advice and recruitment event updates tailored to their interests.

RBC’s careers portal shares information about career paths and how its teams contribute to client and community well-being.

RBC is accepting applications for an existing vacancy. Qualified applicants may hear from the recruitment team for a more detailed review of their résumé.

Search for requisition R0000191022 on the RBC careers portal.

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