Financial Planning Specialist

Requisition	R0000192439
Employer	RBC Dominion Securities Inc.
Canadian locations	Edmonton (Alberta, Canada)
Primary address	199 WEBBER GREENS DR NW, EDMONTON, AB T5T 4K5, Canada
Posted	November 19, 2026
Date in the description	November 10, 2026
Posted deadline	December 3, 2026
Last day to apply	December 2, 2026
Business area	WEALTH MANAGEMENT
Employment status	Regular
Work schedule	Full time · 37.5 h per week
Pay type	Salaried

The position

As an integral member of the Wealth Management Services team, your role as a Financial Planning Specialist is to work with our Advisors to deliver high value customized advice and financial planning to High Net Worth (HNW) clients of RBC. As a valued partner, you will also help with business development, opportunity spotting and revenue generation.

Responsibilities

- Prepare comprehensive financial plans that meet the specific needs of the client in the areas of financial planning, investment, retirement and risk management.
- Customize each financial plan to provide expertise on client issues such as holding companies, employee stock options, individual pension plans, pension agreements, donation and donation planning, etc.
- Simplify complex strategies to assist Advisors
- Present presentations to advisors and clients
- Provide ongoing guidance to financial planning analysts who help with the development of financial plans
- Promote and support a work environment that inspires innovation, creativity, collaboration and diversity
- Develop strong internal and external networks and referral sources

Qualifications

Requirements

- Effective oral and written communication skills
- Ten years of relevant experience in all aspects of financial planning
- Professional designation as CA, CGA, LLB or CMA
- Complex experience in financial planning
- Strong analytical and judgment skills.
- Computer skills: Microsoft Office, -Naviplan Extended-- or CCH – (planning software).
- Ability to work both as part of a team and independently

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Assets

- Financial planning designation: CFP or RFP
- Investment and insurance knowledge are also strong assets

Pay and benefits

RBC teams aim to grow by working together, thinking ahead and giving dependable advice that helps clients and communities prosper. They support one another, develop their potential and strive for outcomes that benefit the communities they serve as well as the bank.

- A total compensation program with competitive pay, bonuses and flexible benefits, plus commissions and stock where applicable.
- A world-class financial services training programme
- Join a collaborative team that works at a high standard and looks for new ways to improve.
- Capacity to make a difference and sustainable impact

Job Skills

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 R0000192439 on the RBC careers portal.

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