Financial Planning Specialist

Requisition	R0000192660
Employer	RBC Dominion Securities Inc.
Canadian locations	Waterloo (Ontario, Canada)
Primary address	652 ERB ST W, WATERLOO, ON N2T 2Z7, Canada
Posted	November 13, 2026
Last day to apply	December 30, 2026
Posted deadline	December 31, 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 RBC Family Office Services team, your role as a Financial Planning Specialist is to work with our advisors to deliver comprehensive, customized financial plans to High Net Worth (HNW) clients of RBC Wealth Management. 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 finance, investment, retirement, tax, risk management and estate planning.
- 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 help advisors.
- Work collaboratively with the Financial Planning Analyst team in the preparation 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

- Five years of experience in tax planning for high net worth clients.
- Five years of relevant experience in all aspects of financial planning.
- One or more of the following accounting professional designations: CA/CMA/CGA/CPA
- Effective communication skills, both verbal and written.
- Strong analytical and judgment skills.
- Microsoft Office and financial planning software like Conquest or Naviplan.
- Ability to work both as part of a team and independently.

Assets

- Knowledge of investment and insurance is also a strong asset.
- Certified Financial Planners (CFP) designation.

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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.

Compensation for this position (including salary and discretionary/variable payments) will be determined by factors, including but not limited to candidate's experience, skills, registration status, performance, individual goals, market conditions, and business needs.

Pay Range

The expected pay range for this position is

$85,000.00 - $130,000.00

The pay scale provided is that of the principal workplace mentioned in the Additional Employment Details section of this assignment. Pay scales may vary depending on location. If the assignment lists several locations, a recruiter can confirm the availability of the relevant role and pay scale for the additional locations listed. RBC supports pay transparency and we strive to ensure that all pay scales are competitive, fair and equitable.

You have the potential to win RBC's discretionary variable pay program, which gives you the opportunity to increase your total pay, provided that businesses meet their performance targets and achieve your individual goals.

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 R0000192660 on the RBC careers portal.

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