Financial Planning Software Solutions Consultant

Requisition	R0000193179
Employer	RBC Dominion Securities Inc.
Canadian locations	Toronto (Ontario, Canada)
Primary address	600 QUEENS PLATE DR, TORONTO, ON M9W 0A4, Canada
Posted	November 19, 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 a Financial Planning Software Solutions Consultant within the Family Office Services (FOS) team, this role empowers RBC Financial Planners, Investment Advisors, Private Bankers, and PH&N Investment Counsellors by delivering technical expertise for key tools, including Conquest Planning, the proprietary myGPS® platform, and Wealth Planning Calculators. Through centralized support, the position streamlines financial planning workflows, enabling advisors to provide differentiated, data-driven solutions that elevate client experiences. Collaborating with Wealth Management, RBC Personal & Commercial Banking, and cross-functional teams, the role bridges technology and strategic advice to enhance precision, efficiency, and client outcomes.

Please note that this is a financial planning consultant role focused on software development, not a technology support position.

Responsibilities

- Financial Planning Tools Support – Help RBC's various sales forces use the financial advice and planning tools approved by the organization to respond to customer inquiries, discover hidden assets, maintain activities and develop referrals.
- Test – Conduct quality assurance (QA) and user acceptance (UAT) tests of updated or newly created tools that are developed internally or acquired from external suppliers.
- Coaching – Provide continuous coaching to users directly or by referring them to employment and other resources.
- Documentation – Create and update employment aids, user guides and other resources; contribute to the regular updating of financial and planning advice tools, reports, questionnaires and marketing materials; and develop new documents when needed.
- Training – Working with Personal and Commercial Banking or Dominion Securities' Learning Services groups, contribute to the development and updates of training programs and supporting material. Regularly facilitate training sessions for the sales force.
- Projects – Participate in various interdepartmental working groups and projects.

Qualifications

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Requirements

- Undergraduate education in a related field, preferably in finance or heritage management.
- CFP, IQPF, QAFP, F. PI., CLU, RRC, or PFP designation
- Knowledge of financial planning software (priority of conquest)
- Minimum 3 - 5 years of experience in the financial planning / wealth management sector
- Knowledge of Canadian tax and pension legislation
- Excellent verbal and written communication and excellent interpersonal skills
- Strong research, analysis and problem solving skills, with data analysis capability
- Ability to manage and prioritize workload with competing timelines
- Ability to work independently and collaboratively within a team

Assets

- An interest in working with financial planning tool development
- Natural curiosity for learning and broadening the personal knowledge base

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 comprehensive total premium program that includes premiums, flexible benefits and competitive remuneration.
- Managers who coach employees and help them find opportunities to develop.
- Opportunities for progressively fulfilling greater responsibilities
- Join a collaborative team that works at a high standard and looks for new ways to improve.

RBC is presently inviting candidates to apply for future vacancies. Applying to this posting allows you to express your interest in future career opportunities at RBC. Qualified applicants may be contacted to review their resume in more detail.

Job Skills

Treasury Management, Client Counselling, Competitive Markets, Client Service, Client Service Management, Decision-making, Interpersonal Relationship Management, Investment Management, Investment Risk Management, Results Orientation

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.

Search for requisition R0000193179 on the RBC careers portal.

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