Financial Planner, Investment and Retirement Planning

Requisition	R0000193200
Employer	Royal Bank of Canada
Canadian locations	Oakville (Ontario, Canada)
Primary address	361 CORNWALL RD, OAKVILLE, ON L6J 7Z5, Canada
Posted	November 20, 2026
Last day to apply	January 30, 2027
Posted deadline	January 31, 2027
Business area	PERSONAL & COMMERCIAL BANKING
Employment status	Regular
Work schedule	Full time · 37.5 h per week
Pay type	Commission

The position

**This is an opportunity for candidates to express their interest in current and/or future Financial Planner, Investment and Retirement Planning positions across the greater Oakville Area. Qualified applicants, if selected, will be contacted to review their resume in more detail.

As RBC's investment and retirement planner, you create customized investment solutions for RBC's potential and existing clients. In addition to your own prospecting and networking activity, you are fully supported by internal partners who send you customer references. Your creativity, motivation and motivation for new investment sales will allow you to provide world-class advice and solutions that help clients achieve their long-term financial goals.

Responsibilities

- Provide tailored financial planning advice and solutions using our unique range of investment and portfolio solutions, including the most appropriate and exclusive mutual fund solutions
- Acquiring and consolidating existing and new RBC clients and assets
- Connect clients to the right RBC team members to help them meet their needs on a continuous basis
- Develop external sources of business orientation through networks, marketing and your centres of influence

Qualifications

Requirements

- Financial Planning Designation (QAFP, PFP® or CFP®)
- Mutual fund licensing (IFIC or CSC)
- Minimum 2 years experience in financial planning
- Experienced skills in networking and client acquisition
- Ability to cultivate strong partnership relationships
- Digital savor, ability to use mobile applications effectively

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Assets

- Language skills in Mandarin/Cantonese

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 including flexible benefits, a competitive commission structure and retirement options
- World-class training programs and career development opportunities
- The advantage of working with a dynamic, collaborative and efficient team where initiative and hard work are recognized and rewarded
- A flexible working schedule based on customer preferences and your own work-life balance
- Innovative mobile technology to ensure your success

Job Skills

Adaptability, Business Development, Customer Centricity, Curious Mindset

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 R0000193200 on the RBC careers portal.

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