Financial Planning Analyst

Requisition	R0000193562
Employer	RBC Dominion Securities Inc.
Canadian locations	Toronto (Ontario, Canada)
Primary address	600 QUEENS PLATE DR, TORONTO, ON M9W 0A4, Canada
Posted	November 25, 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 part of the Family Office Service (FOS) team, the Financial Planning Analyst prepares comprehensive financial plans. The Financial Planning Analyst works in partnership with the Financial Planning Specialists to achieve this goal.

It is a retirement and wealth planning role, which is to provide tax planning, retirement and estate strategies using our personal financial planning tool set.

Responsibilities

- Prepare comprehensive personal financial plans for high net worth clients
- Recommend advice and opportunities to improve the client's financial situation
- Maintain a high level of collaboration and knowledge with partners
- Stay tuned for financial planning standards and practices
- Contribute to ideas and participate in development projects to improve our services
- Provide ongoing mentoring and training to other family office professionals

Qualifications

Must haves

- Undergraduate degree in related field, preferably Finance or Wealth Management
- CFP or PFP designation
- 3 to 5 years of experience in financial planning, preferably in wealth management
- Financial planning knowledge
- Microsoft Office (Word & Excel) knowledge and adaptability to a rapidly changing environment

Assets

- Knowledge of Financial Planning Application Conquest
- Natural curiosity for learning and broadening the personal knowledge base
- Oral and written bilingual (English and French)

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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.
- Managers who coach employees and help them find opportunities to develop.
- Ability to make a difference and have a lasting impact.
- Join a collaborative team that works at a high standard and looks for new ways to improve.
- Flexible work/life balance options.
- Opportunities to do challenging work.
- Opportunities to assume progressively greater responsibilities.
- Access to a variety of job opportunities across business.

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 R0000193562 on the RBC careers portal.

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