

Job Title: **Retirement Counselor**

### **Job Summary**

We are seeking a highly motivated individual for the role of Retirement Counselor with experience in retirement counseling. The ideal candidate will be responsible for providing expert retirement advice and guidance to members/clients in their retirement planning journey and additional financial planning needs. This role requires a deep understanding of retirement planning principles, excellent communication skills, and the ability to build strong relationships with members/clients.

### **Responsibilities**

#### **Retirement Counselling:**

- Conduct comprehensive financial assessments for members/clients to understand their current financial situation, goals, and retirement aspirations.
- Develop personalized retirement plans based on individual members/client needs and financial objectives.

#### **Client Relationship Management:**

- Cultivate and maintain strong relationships with members/clients through regular communication and meetings.
- Address members/client inquiries, concerns, and provide ongoing support to ensure member/client satisfaction.

#### **Education and Communication:**

- Clearly explain complex financial concepts and retirement planning strategies to members/clients.
- Conduct workshops or seminars to educate members/clients on various retirement planning topics.

#### **Compliance and Documentation:**

- Ensure compliance with all relevant financial regulations and industry standards.
- Maintain accurate and up-to-date records of members/client interactions, financial plans, and regulatory documentation.

### **Qualifications**

- Life insurance license in Manitoba is an asset; a life insurance license will be required, if selected for the position.
- Certified Financial Planner (CFP®) or Certified Employee Benefits Specialist (CEBS) designations would be beneficial.
- Proficiency in the English language is required. Bilingual in French and English is an asset.
- Bachelor's degree in finance, economics, or a related field is an asset.
- Proven experience in retirement counseling, financial planning, or a related role.
- Strong analytical skills and attention to detail.
- Excellent interpersonal and communication skills.
- Ability to work independently and as part of a team.

At Ellement, we believe in investing in our business and operating it as effectively as we can. One of the best ways we know is by hiring great people. We also know that by investing in our employees and encouraging ongoing education, upgrading, and training, we're building an environment where staff feel supported, involved, and engaged. We offer a challenging, team-oriented work environment, competitive compensation, and benefits package, and ongoing support for your professional and personal growth.

If interested, please apply directly to [Retirement Counselor CFP at Ellement Consulting Group | Jobs at Ellement Consulting Group \(gohire.io\)](#)

We thank all candidates who apply, however, only those selected for a personal interview will be contacted.