

## Position: Bilingual Financial Planner

**MCA CROSS BORDER ADVISORS INC.** is a rapidly growing specialized cross border financial planning practice. The firm is a leader in developing cross border financial plans to help Canadians moving to the U.S., Americans moving to Canada and employee relocation between Canada and the U.S. achieve their goals in the areas of taxation, estate planning, retirement, health coverage, insurance, investment management and immigration.

We have a unique opportunity for an experienced **bilingual financial planner** to join our team of cross border professionals and become an expert in a growing specialized practice providing complex financial planning services to high net worth and ultra high net worth individuals.

Our culture is founded on client service excellence, integrity and meticulous attention to detail. Successful candidates will possess a demonstrated passion for financial planning and service excellence, and the proven ability to create and present sophisticated, technical plans to clients. Essential traits include a relentless attention to detail and research, high energy, resourcefulness and exceptional written and verbal communication skills.

### Position Summary:

- Develop and maintain sophisticated, written analyses and memoranda with respect to cross border tax issues, risk management, insurance, retirement needs, estate planning, cash flow, education requirements, health care and investments
- Provide clients with timely and responsive service, and regularly apprise of file progress
- Evaluate clients' changing needs and regularly suggest strategies that would improve their financial position
- Demonstrate an avid interest in continuously enhancing financial planning expertise through research and self-study
- Effectively implement practice management processes to successfully manage client expectations
- Contribute to firm publications, attend and participate in speaking engagements and seminars
- Create models and tools to implement solutions to complex cross border issues
- Identify and initiate business development opportunities through attending appropriate network and technical expertise initiatives

### Qualifications & Experience:

- **Financial Planning** designation required
- Fluently bilingual in French and English
- Post-secondary education with ability to demonstrate outstanding academic achievement
- 3+ years of industry experience as a financial planner, preferably in a financial planning firm with a high degree of experience with the creation of custom, comprehensive financial plans
- Consistent ability to exercise sound judgment and discretion
- Effective time management skills with ability to prioritize and multitask in a fast paced environment
- Client service oriented and resourceful team player
- Hands-on approach to deliverables with a high level of integrity
- Flexible and creative problem solver with a result-oriented focus
- Organized and effective written and verbal communicator with ability to develop productive, positive working relationships.
- Avid interest in US/Canadian cross border issues
- Proficiency in Microsoft Office and Financial Planning Software Programs
- **Chartered Professional Accountant** designation or **Masters of Tax** would be considered an asset

Qualified Candidates: Please submit your resume & cover letter in confidence to [careers@mcacrossborder.com](mailto:careers@mcacrossborder.com) - NO AGENCIES PLEASE.