# HIGH NET WORTH PLANNER

Company Overview

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Department Overview

TD Private Wealth Management takes a sophisticated and holistic goals discovery approach to wealth planning and protection to provide highly personalized advice, solutions and service to clients.

**Wealth Advisory Services** delivers strategies for high-net-worth clients in the areas of tax, philanthropic, not-for-profit, business succession and estate planning. Our team of specialists works with other TD advisors and partners to integrate these strategies into overarching wealth management plans that make valuable contributions and help clients achieve their goals. Join us, if you are ready to gain a rewarding career and a diverse and dynamic place to work.

Job Description

As a member of Private Wealth Management, the High Net Worth Planner is responsible for working with TD advisors to deliver high value customized guidance on tax, estate and overall wealth planning to HNW and UHNW clients of TD. Specifically, the High Net Worth Planner has accountability for:

1. Providing professional financial, tax and estate planning support and solutions to qualifying clients of TD Wealth;
2. Assisting advisors and relationship managers with business development, opportunity spotting, and revenue generation; and
3. Executing TD Wealth's high net worth strategy.

The High Net Worth Planner is an experienced practitioner and technical expert, whose expertise is leveraged by partners in TD Wealth and Wealth Advisory Services. He/she will work with Wealth Advisory Services partners as required as SMEs for tax and estate planning.

**Key responsibilities include:**

- Preparing customized wealth plans based on information obtained directly from HNW clients and their relationship managers
- Carrying out independent research to ensure client's key issues (retirement, tax, estate planning) are addressed
- Keeping informed of relevant wealth planning (retirement, tax, estate planning) developments and keeping TD partners informed of developments
- Proactively spotting, anchoring, introducing and following up on opportunities for complimentary businesses and solutions
- Diligently tracking and reporting on a regular basis, the outcome of wealth plans delivered and new business generated

- Working effectively to develop and maintain good relationships with TD Wealth advisors and relationship managers as well as their business leaders within TD Wealth Management
- Working closely and assisting other WAS team members with preparing comprehensive wealth plans
- Proactively promoting PWM, through internal and external educational seminars
- Ensuring appropriate service levels are provided to maximize role profitability, minimize costs and manage business to avoid financial losses and reputational damage to TDBFG
- Carry out other tasks and duties as assigned by manager from time to time

Requirements

**Education/Accreditations:**

1) Undergraduate degree
2) Advanced professional degree (CPA, JD, or LL.B)
3) Certified financial planning designation an asset (CFP, Pl. Fin, etc.)
4) Tax knowledge and expertise on holistic financial planning

**Other Qualifications/Skills/Experience:**

- Minimum 10 years of personal tax experience gained at a law firm, accounting firm or financial institution
- A self-starter with the ability to work independently and to provide high quality services to clients.
- Excellent people and relationship building skills
- Strong communication, presentation, time management, and organizational skills
- Experience using financial planning software (e.g. CCH FP Solutions, Voyant, etc.)
- Computer proficiency (Word, Powerpoint, Excel, etc.)

**Inclusiveness**

At TD, we are committed to fostering an inclusive, accessible environment, where all employees and customers feel valued, respected and supported. We are dedicated to building a workforce that reflects the diversity of our customers and communities in which we live and serve. If you require an accommodation for the recruitment/interview process (including alternate formats of materials, or accessible meeting rooms or other accommodation), please let us know and we will work with you to meet your needs.

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