



Job Title: Director of Financial Planning

Position Summary:

The Director of Financial Planning has overall responsibility for Westmount's comprehensive financial planning activities and experience across clients, prospective clients and colleagues. The Director will serve as a technical resource and will be the principal contributor to thought leadership with respect to planning concepts and strategies. He or she will lead the development and presentation of plans for larger, more sophisticated or more complex situations. The Director will mentor and develop a team of planners, leveraging his or her deep experience, to impart best practices that support the professional development and growth of each planner and the firm.

Responsibilities:

- Manages and directs the firm's financial planning experience and process to ensure exceptional planning deliverables to clients, prospects and internal colleagues
- Supervises other planners and provides training, mentorship and guidance
- Leads the development of large, sophisticated or complex plans and presents the findings and observations to clients and prospects
- Serves as a technical resource to the firm and to clients in financial planning concepts and strategies
- Manages and monitors productivity of the planning team and develops initiatives to meet core objectives of the department and the firm
- Represents the firm at various networking events and gatherings

Qualifications:

- Bachelor's Degree in Business, Accounting, Finance, Economics, or related field
- CFP® (Certified Financial Planner) is required; CPA, JD, or MBA desirable
- At least seven years of financial planning experience
- Demonstrated leadership and supervisory experience is preferred
- Additional experience or expertise in insurance, income tax, and/or estate planning is preferred
- Highly proactive with a disciplined and solid work ethic
- Highly attentive to customer service and client care
- Excellent interpersonal and communication skills
- Outstanding time management and organization skills
- Experience with e-Money is highly desirable