Conquest Planning delivers personalized prioritized financial planning strategies that will help financial advisors and their clients see what possibilities exist for their financial future. We believe a goals-based approach to financial literacy, delivered through a human centered digital experience, will increase the number of people who can benefit from financial advice. . We are based out of Winnipeg, Manitoba and have team members located across Canada, the United States, and United Kingdom.

We are seeking an **Advisor Support & Product Adoption Specialist – Canada**. This is fully remote – work from home opportunity.

Reporting to the Manager, Advisor Support & Product Adoption the Advisor Support & Product Adoption Specialist is responsible for driving the user adoption initiative at Conquest Planning Inc. They will be the main point of contact for end-users of Conquest Planning (e.g., financial planners and financial advisors) and will assist with questions and provide in-depth functional support on how to model a broad range of financial planning concepts in the Conquest Planning application. As part of a wider team, they will also be responsible for creating and maintaining knowledge base content, user training materials, and interactive training delivery.

Responsibilities

- Be the main point of contact for end-users of the Conquest Planning application (e.g., financial planners and financial advisors)
- Assist end-users with questions and provide in-depth functional support on how to model a broad range of financial planning concepts in the Conquest Planning application
- Promote the user adoption of the Conquest application in line with Conquest's mission and strategy
- Pro-actively drive the development and updates of training programs and supporting material, including:
    - Knowledge base articles
    - In-app guidance and help tools
    - Training videos
- Deliver user training sessions and host Conquest Planning application webinars
- Provide ongoing user coaching directly or by referring to suitable learning resources
- Log and collate user feedback and collaborate with the product and development teams on an on-going basis to seek opportunities for product enhancement
- Participate in various working groups & cross-departmental projects as required
- Become familiar with new training and adoption techniques and platforms and continue building personal knowledge in the relevant areas

- Keep up to date with Financial Planning, industry user training concepts and adoption best practices

Qualifications and skills

Required

- University Bachelor's Degree or equivalent work experience in a Financial Services role
- Robust understanding of financial planning concepts
- Familiarity with training best practices and adoption strategies
- Exceptional written and verbal communication skills
- Confidence and proven track record of presenting and discussing complex concepts with industry professionals
- Strong analytical and problem-solving skills with ability to gather and analyse data
- Ability to manage and prioritise workload with competing deadlines
- Ability to work independently as well as collaboratively within a team
- Attention to detail and ability to learn and adapt

Advantageous

- Previous experience as a paraplanner or financial planner highly beneficial
- Previous experience using cashflow modelling technology such as NaviPlan, Voyant, etc.
- Financial planning qualification (Diploma, CFP, etc.) or working towards one
- Project management or business analysis experience

How you will succeed

- You can build positive and collaborative relationships with Product Management, Customer Success, Enterprise Support, and other stakeholders
- You have strong communication skills and an empathetic and can-do approach to problem resolution
- You have a genuine interest in financial planning and a passion for making advice accessible to more people
- You have an aptitude for technology and enjoy learning new concepts
- You are a keen technology adopter and can employ your financial planning expertise in working with technology

What to expect:

- An inclusive culture comprised of extremely talented individuals.
- A leadership team with a proven track record of success.

- The opportunity to join a company as it expands across the globe.
- Competitive compensation and generous benefits.

How to Apply:

We're excited to learn about you and want to give you the opportunity to set yourself apart from everyone else. Along with your Resume, send us a personalized Cover Letter, Email or Video with the following:

  - Why you are interested in this job, the fintech industry, or any other reason you would love to work with us.

Next steps:

If this exciting opportunity is of interest to you, please forward your application as described above with Advisor Support & Product Adoption Specialist – Canada in the subject line to human.resources@conquestplanning.com by **March 15, 2023**

We thank all applicants for their interest. Only those invited for an interview will be contacted.

Conquest Planning Inc. is an equal opportunity employer. Our inclusive work environment welcomes diversity and supports accessibility. If you require accommodation at any time during the recruitment process, please contact Human.resources@conquestplanning.com.