

Job Posting

Posting Date:	January 23, 2012	Start Date:	February 2012
Position Type:	Fulltime, Permanent	Location:	Mississauga, ON
Position Title:	Financial Analyst, Management Reporting	Reporting To:	Manager, Strategic Initiatives
Department:	Business Planning and Strategic Initiatives		

Investment Planning Counsel Inc. is an integrated wealth management company focused on providing Canadians with the best in financial products, services and advice to help them achieve their financial dreams. IPC has developed a strategy that marries the needs of the planners with that of the Company. IPC's intent is to be the premier choice among financial planners who are dedicated to serving the needs of their clients. For more information about IPC, please visit: www.ipcc.ca.

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Job Objectives and Summary:

The Business & Strategic Planning Department is responsible for:

- Advisor Incentive Management
- Advisor Productivity Tracking and Reporting
- Advisor Recovery Management
- Advisor Partners Growth Program and former Senior Associate Share Program
- Advisor Equity Program
- Advisor Loan Program
- Annual Plan and Now Expected
- Sales and Margin Analysis
- Capital and Project Tracking and Financial Analysis
- Financial Reporting and Commentary
- Provide Leadership to specification of IPC's Database architecture
- Create and Maintain Interactive Business/Product Models
- Balanced Scorecard
- Strategic Initiatives that drive the business forward

Job Responsibilities:

- Develop streamlined processes for effective and timely completion of all management reporting utilizing SAP Business Intelligence tool and BEX Query tool including:
 - § Monthly Advisor Activity reporting
 - § Advisor Productivity Database Maintenance
 - § Monthly AUA/AUM statistics compilation
 - § Monthly Sales statistics compilation across all business lines
 - § Preparation of monthly financial reports for Senior Management and IGM
 - § Quarterly Balanced Scorecard Preparation
- Overflow book transfer activity (PGP, loans and legal agreements)
- Other projects, strategic initiatives and special reporting work as required
- Thorough understanding of back office systems including data flow and data tables

Skills and Knowledge Requirements:

- **Third to fourth level of CGA/ CMA with 5 to 7 years of related** work experience.
- Advanced skills with Microsoft Suite particularly Excel and Access
- Good knowledge of SAP or similar software systems including Business Intelligence Module
- Experience with BEX Query tool a definite asset
- Excellent analytical skills with strong attention to detail
- Excellent communication (written and oral), ability to effectively convey information to various levels of staff in a clear and concise manner
- Ability to work with several competing priorities at a time and meet demanding deadlines
- Effective interpersonal and relationship building skills required

Working Conditions:

- Standard corporate business environment.
- Corporate business hours based on 37.5 hour work week (Monday to Friday); ability and flexibility to work extended hours when required.
- Ability to work with tight deadlines.

Please forward your résumé and letter of interest to: Human Resources, Investment Planning Counsel Inc. via e-mail at [**careers@ipcc.ca**](mailto:careers@ipcc.ca).

When applying for this competition, please **specify in the subject line the title of the position** you are applying for.

Additionally, please answer the following questions in the body of your email:

- 1. Number of years of relevant work experience**
- 2. Number of years of work experience in the financial services industry**
- 3. Salary expectations**

We thank all applicants for their interest; however, only those selected for an interview will be contacted.
