

Conquest Planning is a leading financial planning software company with a purpose-driven approach to delivering financial advice. Established in 2018, Conquest Planning was founded by a team of financial technology veterans whose track record of success spans over 30 years in the financial planning software space. The company's mission is to ensure that everyone has access to great financial advice, transforming the financial planning landscape and improving outcomes for all clients. Users of Conquest Planning leverage its intuitively designed product, simple onboarding process, and data-driven artificial intelligence to accelerate the delivery of beautifully designed, hyper-personalised financial plans. We are based out of Winnipeg, Manitoba and have team members located across Canada, the United States, and United Kingdom.

We are seeking a **Product Solutions Analyst – UK** to join our dynamic team!

The **Product Solutions Analyst** is responsible for supporting both strategic and tactical efforts at Conquest Planning. As a detail-orientated and solution-driven professional, the **Product Solutions Analyst**, collaborates closely with clients to architect and implement Conquest solutions tailored to their unique needs. The **Product Solutions Analyst**, is responsible for gathering and documenting client requirements, overseeing project delivery by leading project management efforts, and ensuring development teams are set for successful implementation. This position requires strong communication and organisational skills, as they will liaise with both external clients and internal teams at Conquest Planning to communicate user needs and support the Product team in delivering exceptional results.

This is a remote (within the UK) / work from home opportunity.

Duties of the role include:

- Lead client discovery and solution analyst efforts
 - Gather and analyse information to ensure comprehensive and accurate understanding of requirements that align with business need and the client target operating model
 - Convert client-defined requirements with clarity into thorough documentation for internal and external teams
- Lead planning and project management efforts
 - Lead execution of project delivery, managing timelines, resources, and milestones to ensure successful implementation and resolution of blockers
 - Ensure client delivery tasks stay on schedule and communicate effectively with internal and external stakeholders
 - Track and report progress on epics, tasks, and completed work, ensuring transparency and alignment with external and internal teams
 - Participate in business acceptance testing and support quality assurance efforts to ensure client deliverables meet defined requirements and standards
- Build and nurture strong relationships
 - Build relationships with Product leaders, Development team members, and internal/external stakeholders to facilitate collaboration and project success
- Business analyst efforts
 - Assist in arranging client-driven work and take ownership in delivering value to both internal and external stakeholders, ensuring alignment with product leadership on priorities

- Serve as a business analyst in an agile environment, providing timely support, answering client questions, and researching solutions
- Actively participate as a key member of the Product team, representing the voice of the customer and collaborate with senior Product team members
- Immerse in the FinTech industry, Financial Planning industry methods and practices and software development best practices
 - Stay informed on emerging trends and best practices in Fintech, financial planning, and software development
 - Continuously expand expertise in new technologies, platforms, and development methodologies to enhance personal knowledge and contribute to project success

Qualifications required:

- Proven experience in solution architecture, project management, business analysis, or similar roles in product delivery
- 3+ years of experience as a Product Owner, Business Analyst, or Project Manager
- Familiar with business analysis best practices and agile methodologies for efficient project execution
- A self-starter who is skilled in managing and prioritising multiple tasks and deadlines in a fast-paced environment
- Demonstrated project management abilities, with experience coordinating resources, timelines, and deliverables
- Excellent written and verbal communication skills with ability to convey complex ideas clearly and manage stakeholder relationships
- Proficient in documenting processes, requirements, and project details
- Able to work independently and collaborate effectively within a team setting
- Excellent critical thinking skills, with the ability to approach complex problems strategically
- Effective researcher with ability to gather relevant data to inform decision making and drive actionable outcomes
- Strong presentation skills to engage and influence stakeholders
- Naturally curious, quick to learn, and adaptable to new concepts and technologies

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 personalised Cover Letter, Email or Video telling us why you are interested in this job, the fintech industry, and the reason you would like to work with us.

Next steps:

If this exciting opportunity is of interest to you, please forward your application as described above with **Product Solutions Analyst - UK** in the subject line to Human Resources at human.resources@conquestplanning.com by **August 11, 2025**.

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.