

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-personalized 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 **Financial Planning Consultant - US** to join our dynamic team!

Reporting to the Product Director - US, the **Financial Planning Consultant - US** is primarily responsible for assisting end-users of the Conquest financial planning software by answering questions and providing in-depth functional support, including modelling a broad range of financial planning concepts. Secondary responsibilities could include creating and maintaining knowledge base content, user training materials, interactive training delivery, and functional business testing.

This is a remote / work from home opportunity.

Duties of the role include:

- **Product support:**
 - Deliver expert-level support by helping users navigate Conquest's financial planning tool and by coaching them to effectively apply SAM, Conquest's Strategic Advice Manager, within dynamic, goal-based financial planning scenarios. Ensure users understand how to leverage SAM's AI-driven recommendations and digital co-planning features.
 - Stay up to date with platform enhancements, financial planning trends, and regulatory changes.
 - Analyze user feedback to identify recurring issues and opportunities for product improvement.
 - Collaborate with internal teams to continuously improve the support experience.
- **Training:**
 - Facilitate engaging training sessions and webinars and create videos that promote adoption of Conquest's platform. Tailor content to diverse advisor audiences and support inclusive learning experiences across Canada and globally.
 - Become familiar with new training and adoption techniques and platforms, and continue building personal knowledge in the relevant areas.
 - Contribute to the development of inclusive learning experiences across Canada and globally.
- **Functional Business Testing:**
 - Verify that new features or enhancements meet user expectations and function according to the specified business requirements.

- Act as a SME who understands the user experience and verify outputs against expected business outcomes and execute tests that simulate real user scenarios.
- Report defects that impact product and feature functionality.
- **Documentation:**
 - Develop and maintain high-quality support resources, ensuring that documentation reflects current platform capabilities and user needs, including:
 - Knowledge base articles
 - Instructional videos
 - In-app guidance and help tools
- **Projects:**
 - Collaborate on cross-functional initiatives, including product testing, user experience improvements, and strategic planning efforts.

Work Hours & Availability:

- Support hours are Monday to Friday, 8:00 AM to 8:00 PM ET.
 - Candidates must be available to work flexible hours within this window.

Required Qualifications:

- Bachelor's degree or equivalent experience in financial services.
- Strong analytical and problem-solving skills, with the ability to interpret data and user behavior.
- Proven ability to manage competing priorities and deliver results.
- Self-motivated and collaborative team player.
- Tech-savvy with a passion for learning and adapting in a fast-paced environment.

Preferred Qualifications:

- Holding a recognized financial planning designation (CFP®, ChFC®, FPQP®).
- Experience as a financial planner or paraplanner.
- Hands-on experience with financial planning platforms or CRM tools.
- Knowledge of training methodologies and user adoption strategies.
- Exposure to project management or business analysis.
- Spanish proficiency both written and verbal.

Advantageous:

- Experience as a financial planner or paraplanner.
- Hands-on experience with financial planning platforms or CRM tools.
- Knowledge of training methodologies and user adoption strategies.
- Exposure to project management or business analysis.

How you will succeed:

- Building strong, collaborative relationships across teams to deliver exceptional support.
 - Having strong communication skills and an empathetic can-do approach to problem resolution.
- Demonstrating a passion for financial planning and Conquest's mission to democratize advice.
- Embracing technology and continuous learning to stay ahead of platform innovations.

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 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 **Financial Planning Consultant – US** in the subject line to Human Resources at human.resources@conquestplanning.com by **November 12, 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.