

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.

Reporting to the Vice President, Product Management the **Product Owner, Financial Planning**, will play a critical role in shaping the future of Conquest's flagship financial advice platform. The **Product Owner, Financial Planning** will help define and deliver features that empower advisors and clients across Canada—and beyond. We're looking for an individual who combines financial planning expertise with product ownership experience and a passion for simplifying the complex.

This role is ideal for an individual who thrives at the intersection of technology and personal finance, understands the nuances of Canadian tax rules and retirement programs, and can work closely with developers, designers, and business stakeholders to build impactful solutions.

This is a remote / work from home opportunity.

Duties of the role include:

- Translate business needs into detailed user stories, epics, and acceptance criteria that drive development
- Collaborate closely with developers to deliver timely, high-quality solutions
- Represent the Canadian financial planning user: bring expertise on topics like RRSPs, TFSAs, OAS, CPP/QPP, pensions, and personal tax
- Coordinate cross-team efforts (UX, QA, training, delivery) to ensure feature success from concept through release
- Participate in discovery and research activities to gather insights and validate ideas
- Perform functional testing and provide feedback during user acceptance testing
- Support internal stakeholders (Support, Training, Strategic Accounts) by helping translate product knowledge
- Monitor progress, communicate status, and remove roadblocks to help the team move forward

Qualifications required:

- 3+ years' experience as a Product Owner, Business Analyst, or Financial Planner
- A recognized Canadian financial planning designation (e.g. CFP, QAFP, F.PI., PFP)
- Deep familiarity with Canadian financial products and tax systems
- Proven ability to write clear, actionable user stories and prioritize development work
- Experience working in agile environments, collaborating with developers, QA, and design
- Strong communication, problem-solving, and stakeholder management skills
- A high degree of ownership, independence, and curiosity
- Familiarity with U.S. financial products or experience in the FinTech space is a bonus

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 **Product Owner, Financial Planning** in the subject line to Human Resources at human.resources@conquestplanning.com by **November 24, 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.