



FINANCIAL PLANNER • PERMANENT POSITION • FULL TIME • OLD MONTREAL

WHO WE ARE

Giverny Capital is an investment advisor specializing in private wealth management. Founded on a long-term investment philosophy rooted in fundamental analysis, our firm is recognized in Canada and internationally for its **credibility, rigour and integrity**.

We place transparency and excellence at the heart of each of our professional relationships. More than clients, those who entrust us with the management of their investments are partners to us. At Giverny Capital, every team member contributes directly to the performance and reputation of a firm that creates value over the long term.

Joining our team means growing in a stimulating professional environment, upholding the highest standards of integrity and ethics — and seeing the concrete impact of your own work every day.

THE ROLE

The rigorous and organized Financial Planner plays a key role in supporting our partners and helping them achieve their financial goals. This position requires strong attention to detail, an excellent ability to explain complex concepts with clarity and empathy, and a remarkable aptitude for working as part of a team in a dynamic environment.

KEY RESPONSIBILITIES

- Support our partners in managing their wealth, life projects and financial goals
- Provide personalized advice tailored to each family situation
- Conduct in-depth financial analyses: assessment of goals, understanding of the financial situation, production of reports and formulation of recommendations
- Work closely with the administration department and the investment advisor team
- Stay informed of changes in the Canadian financial and tax environment

CANDIDATE PROFILE

Education and Experience

- Financial planning accreditation from the FPI (Financial Planning Institute)
- Minimum of 5 years of experience in financial planning
- Proficiency with the Naviplan financial analysis and projection tool is an asset
- Bilingualism (French and English)

Skills and Personal Qualities

- Excellent ability to explain financial concepts clearly
- Active listening and a partner-centred approach
- Intellectual curiosity and professional rigour
- Impeccable oral and written communication
- Service-oriented and collaborative mindset

EMPLOYMENT CONDITIONS

Position Type	Permanent, full time
Work Location	Old Montreal — primarily on-site work
Compensation	Competitive based on experience (base salary plus bonus)
Benefits	Group insurance, group RRSP, training budget and other benefits
Environment	A human-scale team, a culture built on trust and excellence

HOW TO APPLY

Please submit your application on our [website](#).

We thank you for your interest in Giverny Capital. We will only contact candidates whose applications have been selected for further consideration.