

SCOTIA FINANCIAL PLANNERS

**Drive your career forward,
on your own terms.**





The Scotiabank Advantage

- The support you need
- The compensation you deserve
- The flexibility to manage your time
- The ability to develop your entrepreneurial spirit

A UNIQUE OPPORTUNITY

At Scotiabank, we're dedicated to helping each and every client realize their financial dreams — whether that's buying a first home, funding their child's education or planning for a secure retirement.

To further our commitment and better serve the financial needs of Canada's growing mass-affluent clients, we introduced the Financial Planner role in 2014, which provides you with the flexibility to meet clients at their convenience, while providing you with the freedom, support and compensation to succeed.

OUR IDEAL CANDIDATE: DRIVEN, ENTREPRENEURIAL, CLIENT-FOCUSED

As a dedicated entrepreneur, you understand that growing a practice is all about building long-term relationships. You know how to leverage your external networks and centres of influence, and welcome the opportunity to grow your own practice. Most importantly, you realize that your clients are your greatest asset, and your priority is providing investment and financial planning advice to help them meet their unique goals.

You also excel at building new relationships and enjoy the flexibility of being able to meet clients outside of the office, on a schedule that best suits you and your clients. Finally, you recognize the value of working within a collective Scotiabank framework that benefits both your clients and your practice overall.

A WINNING TEAM STARTS WITH THE RIGHT CULTURE

At Scotiabank, we understand that growing a successful practice takes the right resources, the right support, and most importantly, the right people. That's why we're committed to helping you succeed in an increasingly competitive market. When you become a Scotia Financial Planner, you'll be part of a winning team that values:

- An entrepreneurial culture with the flexibility to develop your career
- Building long-lasting client relationships through exceptional advice and service
- Compensation structure that rewards growing and maintaining your client base
- Fast-paced, flexible work environment
- Partnering with branches to deliver an exceptional client experience

INCLUSION

We strive to create an inclusive culture where every employee is empowered to reach their fullest potential, respected for who they are, and celebrated for their contributions and unique perspectives.

The ability to grow your own practice

As a Scotia Financial Planner, you'll have the flexibility you need to grow your own practice and direct your career, including:

CHOOSING YOUR OWN CLIENTS AND MANAGING ONGOING RELATIONSHIPS

Your success is built on forging long-term relationships. You'll have the autonomy to build a mass-affluent client base best suited to your specific goals, while still benefiting from the support of Scotiabank.

SETTING YOUR OWN HOURS

Given that meeting clients when and where it's convenient for them is essential to building your practice, you're not constrained to working branch hours or maintaining a branch presence.

FOCUSING ON WHAT YOU DO BEST

As a Scotia Financial Planner, your main focus will be on investments and financial planning for your clients.



LEADING-EDGE RESOURCES TO SUPPORT YOUR GROWTH

As a Scotia Financial Planner, you'll have the tools and resources you need to succeed in building your mass-affluent client base. Scotiabank is committed to investing in the skills, knowledge and support of each Financial Planner, including:

- **Dedicated marketing support** to help you generate business
- **Tailored sales enablement and support services** to enhance your business, deliver expert financial advice, and drive confident growth
- **Technology** to easily transition and service clients – from anywhere
- **Leading Customer Relationship Management (CRM) software** to help manage and service your clients efficiently
- **Robust portfolio software** to assist with investment planning and portfolio analysis
- **Powerful financial planning software** to help deliver detailed planning solutions
- **The strength of the Scotiabank brand**, recognized for integrity, sound advice and dedication to helping clients meet their financial goals

THE BEST OF BOTH WORLDS: ACCESS TO SCOTIA GLOBAL ASSET MANAGEMENT AND THE BRANCH NETWORK

As a Scotia Financial Planner, you'll have access to a vast suite of products and solutions from Scotia Global Asset Management® while partnering with Scotiabank branch(es).

As one of Canada's largest asset managers, Scotia Global Asset Management offers a broad range of investment solutions to meet the diverse needs of your clients. Scotia Global Asset Management is committed to enriching your clients' futures with outstanding investment solutions delivered in partnership with comprehensive advice. You will benefit from:

- Innovative thinking and evolving investment products to meet client needs
- Portfolio manager views and detailed market commentary and insights

BY PARTNERING WITH BRANCHES, YOU'LL ALSO BENEFIT FROM:

- Access to client leads with high investment potential
- Opportunity to engage clients who have a developing branch relationship and material investment needs
- Ability to work with the branch to deliver complete financial advice (i.e., credit card, bank account and borrowing solutions)
- Opportunity to access branch space to host client meetings and special events depending on availability

Leading investment solutions from Scotia Global Asset Management

We give you the building blocks to help your clients attain their financial goals. As a Scotia Financial Planner, you'll have access to a comprehensive range of investment solutions that are constantly evolving to meet client needs — from individual mutual funds and portfolio solutions from ScotiaFunds and Dynamic®, as well as Guaranteed Investment Certificates and complementary savings products from Scotiabank.

SCOTIAFUNDS®

- Money Market
- Fixed Income
- Balanced
- Equity
- Index Funds
- Corporate Class
- Portfolio Solutions

DYNAMIC®

- Equity
- Fixed Income
- Corporate Class
- Private Investment Pools
- DynamicEdge Portfolios
- Dynamic® Active ETFs



COMMITTED TO CULTIVATING A WORLD-LEADING WORKPLACE



2025 Best Workplaces™ in Canada
Great Place to Work® Canada



**2025 Best Workplaces™ in
Financial Services & Insurance**
Great Place to Work® Canada



**2025 Best Workplaces™ with
Most Trusted Executive Teams**
Great Place to Work® Canada

WHAT SCOTIA FINANCIAL PLANNERS
ARE SAYING...

“The transition to Scotiabank was seamless for my clients and for me. From client onboarding to customized marketing, the ongoing support I receive is outstanding.”

— Financial Planner, Vancouver, BC

“Mobility helps me excel in this role. It provides me with the ability to meet my clients when and where they need me, making me a key resource for their financial security.”

— Financial Planner, Kitchener, ON

“My clients tell me every day that our relationship is extremely important to them. I’m thrilled to be part of an organization that places as much value on building enduring client relationships as I do.”

— Financial Planner, Toronto, ON

To learn more about an exciting future
as a Scotia Financial Planner, visit
scotiabank.com/careers

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Scotia Global Asset Management is a business name used by 1832 Asset Management L.P., a limited partnership, the general partner of which is wholly owned by Scotiabank. Scotia Global Asset Management offers a range of wealth management solutions, including mutual funds, and investment solutions for private clients, institutional clients and managed asset programs.

ScotiaFunds® and Dynamic® are managed by 1832 Asset Management L.P., a limited partnership the general partner of which is wholly owned by The Bank of Nova Scotia. ScotiaFunds and Dynamic are available through Scotia Securities Inc. and from other dealers and advisors. Scotia Securities Inc. is wholly owned by The Bank of Nova Scotia and is a member of the Canadian Investment Regulatory Organization.

Commissions, trailing commissions, management fees and expenses may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed or insured by the Canada Deposit Insurance Corporation or any other government insurer, their values change frequently and past performance may not be repeated.