

## Position: Account Manager

Planswell uses patent-pending technology to create the most intelligent financial plans in the world, absolutely free. We enable people from all walks of life to align their investments, insurance and borrowing with their personal goals. To date, we have built over 100,000 financial plans for Canadians across the country and have raised over \$13.8 million in funding. Most recently, Planswell was named one of LinkedIn's Top Canadian Startups.

We're looking for an Account Manager with a passion for providing mind-blowing customer experience to join our mission! This is an intermediate-level position that is responsible for understanding what financial expertise our current clients need and providing it to them when they need it.

### What You'll Do:

- Ensure that every Canadian who has implemented any trade line with Planswell is being contacted on a regular basis to improve their financial plan as their life happens
- Work closely with our Sales Operations team to determine which clients need attention and why
- Work closely with our Head of Sales to develop new processes and structures to enable growth of the AM team
- Communicate with existing clients to provide timely, expert advice to develop their financial plan based on their life goals
- Be a major component and a catalyst for shaping the business
- Bring a passionate attitude with a genuine desire to help others

### You Have:

- 1 - 4 years' experience working in an environment where you are constantly interacting with existing customers to provide guidance on how they should best work with your organization, including both proactive and reactive sales and customer success
- A deep desire to win, exceed performance expectations and grow personally and professionally
- Building or working with reports and data in a CRM to understand what your customers need and why they need it
- A track record of crushing your metrics
- Opportunity management and how to forecast appropriately
- An affable, friendly nature that instantly inspires trust in people you speak to
- A constant focus on self improvement, attention to detail and ability to give and receive feedback

### You Might Also Have:

- Experience working within Salesforce is a huge plus
- Leadership experience in any capacity (sports teams, volunteer groups, etc.)
- Experience building a team
- Passion for personal finance/personal finance experience

**Why Planswell:**

This is your opportunity to join an early-stage fintech startup, and work with a dedicated team of 50+ smart collaborators in our beautiful office in Downtown Toronto. We offer a competitive salary with stock options, access to group health and dental benefits, flex hours and catered lunch twice a week. We anticipate rapid growth over the coming years, which will allow you to scale and grow with us!

Please apply with your resume. As well, please take 15 minutes to complete our two-part Predictive Index assessment at <https://assess.predictiveindex.com/xWeNq> as a part of your application.