1701 West Broadway
Vancouver BC V6J 1Y3
RGF Integrated Wealth Management Ltd.
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Associate Financial Advisor

RGF Integrated Wealth Management, a well-established, financial planning company located in Vancouver, has an immediate exciting opportunity for an Associate Financial Advisor.

As an Associate Financial Advisor, you will be working directly with an RGF Financial Advisor in an advice-giving capacity to that advisor's clients. This is a great opportunity for someone who wishes to start as an Associate Financial Advisor with the goal of progressing to become a Financial Advisor and the potential for eventual client ownership.

You would be providing comprehensive financial planning, investment and risk management to meet the goals of the advisor's clients. This role includes developing and maintaining client relationships, preparing financial plans, retirement income projections and tax information.

Skills and Education Requirements / Key Competencies

- Minimum of 3-5 years working in a similar capacity in a securities environment and/or financial planning, including a high level of exceptional client service
- Client-centered with excellent inter-personal, verbal and written communication skills; a professional appearance. Strong desire to provide superior client service.
- Securities licensing with CIRO (formerly IIROC) required
- Certified Financial Planner (CFP) designation or the ability to achieve this within 2 years. This requires either a university degree or 10 years of qualifying working experience.
- Chartered Investment Manager (CIM) or Certified Financial Analyst (CFA)
- University degree and/or Financial Management Diploma from BCIT
- Life Insurance (LLQP) and ISM securities trading system knowledge would be an asset
- Strong organizational skills and highly observant with mindfulness to detail
- Excellent computer skills – MS Office, Excel
- Ability to work independently and as a team member
- Proven prioritizing and multitasking skills to meet deadlines in a timely manner in a fast-paced environment.
- Entrepreneurial spirit, initiative and a desire to succeed
- Proactive and demonstrates a high degree of perseverance
- Ability to explain complex information to clients in a simple and clear way

Duties and Responsibilities

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With a focus on relationship management, advice and business development:

- Case preparation support to Financial Advisor (research, financial plans, including identifying client's life and financial goals, investment policy statements, insurance quotes, client meeting support.
- Assisting with portfolio revisions and oversight of securities accounts.
- New business processing.
- Client service via telephone and emails.
- Prepare ongoing analysis with respect to investment portfolio design (managed and fee-based accounts).
- Ensure all client information and regulatory requirements are up to date and current.
- Develop and strengthen client relationships and build new ones through client referrals, centers of influence, networking and the like.
- Contribute to team and company goals.
- Participate fully as a member of the team, support and positive and service-oriented work environment.
- Possess a deep understanding of the industry.

We offer a competitive and comprehensive compensation and benefits plan, and a positive work environment. If you are looking for an opportunity to develop your skills, in a supportive working environment, we'd love to hear from you.

Salary range: $75,000-$95,000 plus bonus, dependent on qualifications.

The position is a hybrid model with 1-2 days per week from home after completion of 6 months of employment.

To Apply
Please e-mail your cover letter (including salary expectations) and resume to vvlaovich@rgfwealth.com. Put "Associate Financial Advisor" in the subject line of your email.

Please note: Only those applicants selected for an interview will be contacted.