



## Client Services Associate

RGF Integrated Wealth Management, a well-established, financial planning company located in Vancouver, has an immediate exciting opportunity for a **Client Services Associate** who can provide outstanding organizational and administrative support to a Financial Advisory Team. This is an excellent position for someone seeking a high level of responsibility and wishing to obtain first-class experience in the financial planning 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.

### Skills and Requirements:

- Post-secondary education - BComm/BBA, Financial Management Diploma from BCIT or equivalent experience
- Canadian Securities Course (CSC) and Conduct & Practices Handbook (CPH) an asset, or securities license preferred
- Knowledge of mutual fund/securities products, regulations, policies, and procedures
- Excellent typing and computer skills - MS Office, database experience
- Excellent interpersonal, verbal, and written communication skills
- Strong organizational skills and attention to detail
- Ability to work independently and as a team member
- Proven prioritizing and multitasking skills to meet deadlines in a fast-paced environment
- Strong desire to provide high-quality client service
- 2+ years of experience in a financial services environment an asset

### Duties and responsibilities:

- Organizational and administrative support to Financial Advisor
- Client meeting support (client inquiries, scheduling, database maintenance, assistance with research, analysis, financial plans, client statements, quotes, marketing support)
- Securities, mutual funds, life and disability insurance processing and follow-up
- Product reporting

### To Apply

Please e-mail your cover letter (including salary expectations) and resume to [kleon@rgfwealth.com](mailto:kleon@rgfwealth.com). Put "Client Services Associate" in the subject line of your email.

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