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RGF Integrated Wealth Management Ltd.
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Client Services Associate

RGF Integrated Wealth Management; a well-established financial planning company located in Vancouver, has an immediate opportunity for a **Client Services Associate** who can provide outstanding organizational and administrative support to a growing Financial Advisory Team.

The cornerstone of the Team's work is the strength of the personal relationships we develop with clients. With a rock-solid foundation and a disciplined planning process we bring simplicity to each client's unique goals – enabling them to take control of their journey to financial independence. The successful candidate will be a hard-working individual who is well organized and enjoys managing various administrative processes.

This full-time position will be responsible for preparing files for client meetings, maintaining client records, producing client statements, database maintenance, and other administrative duties with multiple tasks and deadlines.

This job is best suited to an individual looking for a long-term administrative career. Attention to detail, the ability to solve problems and a willingness to learn are a must.

Skills and Requirements:

- 1-2 years of experience in an administrative or financial services environment
- Strong typing and computer skills: Windows, MS Office – Excel & Word
- Strong organizational skills and attention to detail
- Post-secondary education (degree or diploma)
- Proven prioritizing and multitasking skills to meet deadlines in a fast-paced environment
- Strong desire to provide high-quality client service
- Excellent interpersonal, verbal, and written communication skills
- Knowledge of mutual fund/securities products, regulations, policies, and procedures would be an asset
- Canadian Securities Course (CSC) and Conduct & Practices Handbook (CPH) is an asset

Duties and responsibilities:

- Organizational and administrative support to a Financial Advisory Team
- Client meeting support (assistance with research, analysis, client statements)

- Processing forms, producing monthly review lists, data entry and databases maintenance

Remuneration includes a competitive benefits package, education support, RRSP-matching program, Life, AD&D and Disability insurance and an annual paid day off to volunteer in the community. Only those applicants selected for an interview will be contacted.

Established in 1973, RGF Integrated Wealth Management is an independent financial services firm, owned and operated by its professionally qualified financial advisors and portfolio managers. We are dedicated to always serving our clients' needs first while maintaining our long-term view to financial planning, and implementation of comprehensive solutions for our clients. We are renowned for our commitment to providing consistent, quality service.

Please email your cover letter and resume to Nick at nhearne@rgfwealth.com.

Put "Client Services Associate" in the subject line of your email. Only those applicants selected for an interview will be contacted.