



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 client service and administrative support to an experienced Financial Advisor.

The firm is built on the confidence and trust that clients place in RGF. Our professionally qualified staff are dedicated to always serving our clients' needs first.

This full-time position will be responsible for dealing with client inquiries, scheduling, securities processing, client contact follow-up, client reporting, insurance processing, database maintenance, marketing support and other administrative duties with multiple tasks and deadlines. As a key point of contact for client inquiries, excellent customer relations skills are essential. As a valued member of our team, you will have a flexible attitude, adapt easily to changing priorities, and a strong dose of professional curiosity.

We offer a competitive and comprehensive 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)
- Canadian Securities Course (CSC)
- Knowledge of mutual fund/securities products, regulations, policies, and procedures
- Strong typing and computer skills: Windows, MS Office – particularly Excel and Word w/PowerPoint
- Excellent interpersonal, verbal, and written communication skills
- Strong organizational skills and attention to detail
- 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

To Apply

Please e-mail your cover letter (including salary expectations) and resume to frasere@conconrdconsulting.com. Put "Client Services Associate" in the subject line of your email. Only those applicants selected for an interview will be contacted.