



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

Compensation:

- Remuneration includes base salary, competitive benefits package, education support, RRSP-matching program, and an annual paid day off to volunteer in the community.

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About Us:

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.



To Apply

Please e-mail your cover letter (including salary expectations) and resume to bvande@rgfwealth.com

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