



## Financial Planning Associate

RGF Integrated Wealth Management, a well-established, financial planning company located in Vancouver, has an immediate exciting opportunity for a **Financial Planning 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:

- University degree (BComm / BBA) and/or Financial Management Diploma from BCIT
- Minimum three years of related experience in securities environment and/or financial planning, including customer service
- IIROC license required
- Canadian Securities Course (CSC) and Conduct & Practices Handbook (CPH), and Certified Financial Planner (CFP) or equivalent designation required
- Life Insurance License (LLQP) and ISM securities trading system knowledge would be an asset
- 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

### Duties and responsibilities:

- Case preparation support to Financial Advisor (research, financial plans, investment policy statements, quotes, etc.)
- Assisting with portfolio revisions and oversight of securities accounts
- New business processing (forms and trade orders)
- Client meeting support to Financial Advisor
- Administrative duties to Financial Advisor (daily trades, data entry, photocopy/scan)
- Client services via phone, email, fax and in person

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To Apply

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

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

