



## 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 Alain Quennec's 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.

Reg and Alain are looking for someone who will take their role extremely seriously, but not themselves. We like to laugh and have fun, all while providing a great experience for our clients. We are looking for someone with a great attitude who enjoys being in this team environment.

We need someone who is a people person, who likes to do everything they can to get the client what they need, and not be afraid to go the extra mile. The right candidate will make clients feel special, like they are the only thing that matters - and it'll be true.

Our clients are very relationship-oriented, and they will want to get to know our new team member and develop a relationship. This is, above all, a client-facing role. We've been fortunate the last few years to work with team members with whom my clients love spending time. We have a more mature clientele, so manners and presentation are key.

This role will be responsible for trades, blotter, data, making appointments, greeting and escorting clients to Alain's office, engaging in small talk along the way. There's a lot of detail in what we do, so attention to getting things right, and being consistent about it, is extremely important.

Notice the "whom" we slipped in there? Applicants must have a need to write grammatically correct, concise client communications.

Beyond the necessary nitty-gritty stuff that's necessary to keeping the lights on and the practice running, there's a great opportunity to learn in a highly structured practice environment - and we're always looking to improve our processes and get better. Suggestions are needed, encouraged, and expected. We need someone who can make us better. As for the learning part, team members are encouraged to ask questions of me - the more you know, the better you can grow and serve the client. We'll make you look good to the clients every time you achieve a new level of capability.

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If you want to learn, grow, get multiple licenses for securities and insurance, designations, etc. and learn about what life is like in the world of integrated wealth management, then email your application including resume and cover letter to [rsangha@rgfwealth.com](mailto:rsangha@rgfwealth.com).

Compensation to be negotiated, commensurate with education, licensing, and experience. Only those applicants selected for an interview will be contacted. No telephone calls or recruitment agencies will be accepted.

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.

