



Operations Administrator

RGF Integrated Wealth Management (RGF) is an independent financial services firm, owned and operated by its professionally qualified financial advisors and portfolio managers. For more information, visit www.rgfwealth.com.

Summary

As part of the back-office team, the Operations Administrator is the “go-to person” for operational and administrative support of our securities business to the firm’s advisors and their direct staff. This role will provide administrative support to the firm’s securities operations functions, completing duties consistent with established standards and timelines. This position is a two-year contract with the potential opportunity to move to a permanent position.

This position is best suited to someone with experience providing superior administrative support, preferably in financial services. Exceptional organizational and prioritization skills and a strong focus on accurate task completion; solid verbal and written communication and interpersonal skills; an ability to quickly and easily learn and enthusiasm to fully participate as a member of a team and contribute to a positive work environment.

Required Skills, Experience and Education

- Proficiency in a Microsoft environment, including intermediate Word, Excel, PowerPoint
- High level of attention to detail and excellent follow-ups
- Excellent command of written and spoken English
- 1-2 years experience in a professional office environment required
- Post-secondary education, ideally Business Administration, or equivalent experience
- Financial industry experience and/or Canadian Securities Course (CSC) an asset

Primary Functions and Responsibilities

- Daily paperwork review and transmission
- Processing of client cheques and monitoring debit balances
- Lead support and resolution source for financial advisors and their direct assistants including handling account issues, discrepancies, trade errors and general inquiries
- Support and train on Carrying Dealers application systems: DataPhile, Croesus, DocuSign and other equivalent systems
- Report generation and account analysis for the advisory staff;
- Administering follow-ups
- Assisting with the execution and implementation of procedures
- Primary back-up for senior Operations role – vacation/absence or other coverage

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- Coverage for Receptionist for breaks 30 mins daily, plus vacation/absence coverage
- Scheduling/calendar management/follow-ups
- Other administrative tasks and projects as required

How to Apply

To apply for the role, please email your resume with a cover letter to recruiting@rgfwealth.com with the subject line 'Ref: 202011 - Operations Administrator'.

Only those applicants selected for an interview will be contacted. No telephone calls or recruitment agencies will be accepted.

