



## Operations Administrator (Contract)

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](http://www.rgfwealth.com).

### Summary

This 9-month contract role will provide operational and administrative support of our securities business to the firm's advisors and their direct staff to allow our permanent team members to dedicate some of their time to project implementation. We are willing to help interested candidates obtain securities licensing, so this is a great opportunity for someone looking to advance their career while learning the behind the scenes of a securities dealer with training from an experienced and supportive team. There may also be opportunities to move to a position in the advisory teams at the conclusion of the contract.

Financial services industry experience is an asset but most important is the ability to learn quickly and easily, and the enthusiasm to fully participate as a member of a team in 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
- Strong focus on accurate task completion
- Solid verbal and written communication and interpersonal skills
- Post-secondary education, ideally Business Administration, or equivalent experience
- Financial industry experience is an asset
- 1-2 years of experience in a professional office environment is an asset

### Primary Functions and Responsibilities

- Daily account documentation review and transmission
- Processing of client cheques and monitoring debit balances
- First point of contact for support and issue resolution for advisory teams
- Data entry
- Report generation
- Administering follow-ups
- Assisting with the execution and implementation of procedures
- Coverage for Receptionist for breaks 30 mins daily, plus vacation/absence coverage
- Other administrative tasks and projects as required

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## Salary Range

\$45,000.00-\$50,000.00 per year

## How to Apply

Applications can be submitted via Indeed by clicking [here](#).

Please note that only those applicants selected for an interview will be contacted. No telephone calls or recruitment agencies will be accepted.

