



Operations and Technology Administrator

RGF Integrated Wealth Management is an independent integrated financial services firm with over 60 employees, located in Vancouver. This position is part of the corporate team, which provides behind the scenes operational and administrative support for multiple financial advisory teams. Specifically, as part of the Operations and Technology Team, technology and cybersecurity solutions are included in the support offered. Training will be provided, however, a strong foundational knowledge of Microsoft programs including Word, Excel and Outlook is essential.

Key responsibilities include:

- User onboarding, offboarding and change management on all facets of our technology platform including license management and invoice reconciliation.
- Phone system, printer and AV equipment support working with various providers for setup, maintenance, changes, troubleshooting and issue tracking.
- Assist in system upgrade testing as a member of the OpsTech team
- Tracking and follow up required to ensure compliance with Canada's Anti-Spam legislation
- Various data administration activities including data extracts, clean-up, reporting and reconciliation across multiple systems including Dynamics CRM, Croesus and Ticoon.
- Reception coverage as part of team for covering breaks and vacations of primary Receptionist.
- Initial systems end user support with a heavy focus on Microsoft systems including Outlook, Teams, SharePoint and Dynamics CRM.
- Document new administration procedures and update existing procedures.
- Note taking and follow-ups for various meetings.
- Various other project, administrative and operational tasks as required.

This position offers the right candidate the opportunity for growth and expansion of job duties allowing them to increase their knowledge and gain experience in the areas of operations, administration and technology. Successful applicants should be comfortable with administrative duties, providing friendly and efficient support to end users and generally making a difference.

Job Requirements

- Minimum 2 years of professional administrative experience
- Experience in a client service or support position

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- Ability to work in a team
- Highly organized with the ability to work in fast-paced environment
- Intermediate knowledge of Office Suite including Excel and PowerPoint
- Excellent command of written and spoken English
- Minimum typing speed of 50 wpm

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

Please note that only those applicants selected for an interview will be contacted.

