1701 West Broadway
Vancouver BC V6J 1Y3
RGF Integrated Wealth Management Ltd.
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T 604.732.6551
F 604.732.6553
TF 1.800.784.6066
W rgfwealth.com

Client Services Associate

RGF Integrated Wealth Management, a well-established, financial planning company located in Vancouver, has an immediate exciting opportunity for a **Client Services Associate** who can provide 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.

Compensation to be negotiated, commensurate with education, licensing, and experience.

Salary range: $45-$55K dependent on licensing and experience.

Skills and Requirements:

- Post-secondary education - BComm/BBA, Financial Management Diploma from BCIT or equivalent experience, other degrees considered
- Canadian Securities Course (CSC) and Conduct & Practices Handbook (CPH) or compliance with applicable CIRO proficiency requirements an asset, or securities license preferred
- Knowledge of mutual fund/securities products, regulations, policies, and procedures preferred
- Knowledge of insurance products, regulations, policies, and procedures preferred
- 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
- 2+ years of experience in a financial services environment an asset

Duties and responsibilities:

- Organizational and administrative support to Financial Advisor and team

- Client meeting support (client inquiries, scheduling, meeting preparation, database maintenance, assistance with research, analysis, financial plans, client statements, quotes, marketing support)
- Securities, mutual funds, life and disability insurance processing and follow-up
- Product reporting

Benefits:

- Comprehensive Health and Dental Benefits
- Health Care and Taxable Wellness Spending Accounts
- Continuing Education Opportunities, Employee Assistance Program, Life Insurance
- Three weeks of Vacation per year as well as paid personal days
- RRSP matching
- Monthly engagement events and activities

To Apply

Please e-mail your cover letter (including salary expectations) and resume to aensing@rgfwealth.com. Put “Client Services Associate” in the subject line of your email.

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