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RGF Integrated Wealth Management Ltd.
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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 client-facing 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 with room to grow into a Financial Advisor.

If the job posting remains active, we are still accepting and reviewing applications. Our focus is on finding the right long-term fit for our team, so we are taking the time to thoughtfully evaluate candidates throughout the process.

Compensation will be based on the candidate's education, licensing, and relevant experience. The current salary range for this position is $50,000 to $75,000 annually.

Skills and Requirements:

- Outstanding character and drive for excellence; strong desire to provide the highest-quality client service
- University degree and/or Financial Management Diploma from BCIT
- Minimum three years of related experience in securities environment, insurance, and/or financial planning, including customer service
- CIRO (previously IIROC) license required
- Have completed the Canadian Securities Course (CSC), Conduct & Practices Handbook (CPH), and Wealth Management Essentials course before 2026, or compliance with CIRO's new proficiency requirements applicable to the role.
- Certified Financial Planner (CFP) or equivalent designation is an asset
- Chartered Investment Manager (CIM) or Chartered Financial Analyst (CFA) is an asset
- Life Insurance License (LLQP) is an asset
- Familiarity with Broadbridge Dataphile and Microsoft Dynamics 365
- Ability to be proactive, prioritize, and multitask in a fast-paced environment
- Excellent organizational skills and attention to detail
- Excellent interpersonal, verbal, and written communication skills
- Excellent typing and computer skills - MS Office, database experience

Duties and Responsibilities:

- Administrative duties (daily trades processing, forms preparation, new business processing etc.)
- Research, process, and follow ups related to investments and insurance
- Case preparation support to Financial Advisor (research, financial plans, investment policy statements, quotes, etc.)
- Client meetings support (inquiries, scheduling, meeting preparation)
- Client services via phone, email, and in person

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

Apply

Please e-mail your cover letter and resume to kleon@rgfwealth.com. Use "Your Name – Financial Planning Associate" in the subject line of your email.

Please note only those applicants selected for the next step in the hiring process will be contacted.