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RGF Integrated Wealth Management Ltd.
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Client Services Associate

RGF Integrated Wealth Management, a well-established, financial planning company located in Vancouver, has an immediate opportunity for a **Client Services Associate (10- to 12-month contract)** who can provide outstanding organizational and administrative support to a Financial Advisory Team.

We offer competitive compensation 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.

Skills and Requirements:

- Post-secondary education - BComm/BBA, Financial Management Diploma from BCIT or equivalent experience
- Intermediate level (minimum) MS Office Excel and Word skills
- Excellent interpersonal and verbal communication skills
- Excellent written communication skills (ability to convey messages in a concise, friendly, and grammatically correct manner)
- 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

Duties and responsibilities:

- Organizational and administrative support to Financial Advisory team
- Client meeting support (scheduling of meetings, database maintenance, electronic delivery of client reporting,)

What else you should know:

This is **not** a Work from Home position. Office hours are Monday to Friday 8:00 am – 4:30 pm. Candidates selected for an interview will be asked to undertake aptitude and skills testing.

To Apply

Please e-mail your cover letter (including salary expectations) and resume to tbh@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.

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