

PCG - TRANSITION SPECIALIST VANCOUVER, BC Job Posting # 14-084

Raymond James Ltd. is seeking a Private Client Group (PCG) – Transition Specialist to work in our downtown Vancouver office. Raymond James Ltd. is one of Canada's leading independent investment dealers offering high quality investment products and services to Canadians seeking customized solutions to their wealth management needs.

Under the direction of the Supervisor, Transition Services, the Transition Specialist's responsibilities are wide-ranging and include the requirement to travel on short notice.

Drawing on a minimum of 3 years investment industry experience, the Transition Specialist will assist the PCG Senior Management team in transitioning and supporting Financial Advisors in Canada. Specifically, together with our existing Transition Specialists, the individual will be responsible for the maintenance of a comprehensive process, from the initial training to the ongoing support of new Advisors in PCG branches. This includes providing PCG branches with preliminary and ongoing Operational training, as well as assistance with Dataphile functionality and the navigation of various systems. This position interfaces with the Independent and Corporate branch system to resolve issues and/or elevate them to senior management. It also involves liaising with the Branch system and business units while serving as the key contact for the Independent Financial Services (IFS) branch staff in order to address any inquiries into Raymond James procedures and operations.

To qualify for this opportunity you possess:

- Minimum 3 years of industry related experience;
- Post-secondary education;
- Experience with Dataphile is required;
- Completion of the Canadian Securities Course would be an asset;
- Proficiency with MS Office particularly Word, Excel, PowerPoint and Outlook as well as Internet Explorer;
- A solid understanding of the procedures and processes supporting Financial Advisor and Sales Assistant roles;
- Superior customer service skills;
- Well-developed interpersonal skills and the ability to handle confidential information with tact and discretion;
- Ability to work in a team environment and demonstrate a professional and friendly manner;
- Flexibility and willingness to assist others as required;
- A proactive approach to problem solving;
- Superior organizational, multi-tasking and problem solving skills;
- Ability to prioritize and effectively manage time with minimal supervision;
- A meticulous attention to detail and accuracy;
- Excellent verbal and written communication skills;
- A valid driver's license is required;
- Ability to travel on short notice.

This is a full-time position with a competitive compensation and benefits package. **Please note that this position will involve travel within Canada.**

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting #** by August 15th, 2014 to:

Human Resources
Raymond James Ltd.
2100 – 925 West Georgia Street
Vancouver, BC V6C 3L2
E-mail: resumes@raymondjames.ca

We thank all candidates for their interest and advise that only those under consideration will be contacted.