RAYMOND JAMES

FINANCIAL ADVISOR ASSOCIATE

VANCOUVER, BC

Job Posting # 18-209

Are you looking to grow your career in the investment industry and be part of one of the top producing teams in Canada? We are looking for candidates that can add value to our clients through their expertise, hard work and dedication. Pinkowski Wealth Management is seeking a full-time Financial Advisor Associate or Certified Financial Planner (CFP) to work in our Vancouver Cathedral Private Client branch.

Raymond James Ltd. is Canada's leading independent investment dealer offering high quality investment products and services to Canadians seeking customized solutions to their wealth management needs.

The associate will be part of a dynamic team that is dedicated to our clients' well-being providing them with a higher level of service. We go above & beyond for clients and are looking for an individual who has the same mentality. This position is ideal for someone looking for a long term career where they can grow and add value to clients with their investment industry knowledge.

Responsibilities will include:

- Preparing portfolio reviews and investment management proposals to clients and prospects;
- Assist in answering client questions regarding their accounts and financial plans;
- Review/monitor daily cash balance reports;
- Review risk tolerance and asset allocation during portfolio review preparation;
- Review daily activity reports;
- Follow up on movement of money between client accounts to ensure accuracy;
- Investigate and resolve other account-related inquiries;
- Utilize related software to run reports and queries for various monthly processes;
- Assist with cash flow projection analysis and tax package preparation; and
- Helping with research if you have the experience and knowledge (area of growth).

To qualify for this opportunity you ideally possess:

- Proficient in English, oral and written;
- Minimum 3 years work experience in the investment industry;
- Prefer candidate to be IR licensed with completion of the Canadian Securities Course (CSC) and Conduct and Practice Handbook (CPH) Couse;
- In the process of obtaining CFP designation is considered an asset;
- Completion of a degree or diploma;
- Proficiency with MS Office including Word, Excel and Outlook;
- Experience with Salesforce CRM is an asset;
- Experience in entering trades is an asset;
- Strong analytical and communication skills;
- Strong problem-solving skills;
- Strong organizational, multi-tasking and time management skills with the ability to prioritize;
- Ability to work in a fast paced environment and demonstrate a professional and friendly manner; and
- Flexibility and willingness to assist others as required.

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This is a permanent full-time position with a competitive compensation and benefits package.

If you are excited to join a top team and excel in your investment career, please send us your resume and covering letter, **quoting the position and Job Posting # 18-209 by March 6, 2020 to**:

Human Resources
Raymond James Ltd.
Email: resumes@raymondjames.ca

To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company, including but not limited to a credit and criminal record check. Employment is contingent on the satisfactory completion of a pre-employment background check.

We sincerely thank all applicants who express an interest in this role: only those being directly considered will be contacted.

Raymond James Ltd. recognizes the value of a diverse workforce and appreciates the unique skills and special contribution of each employee. We are committed to accessibility for candidates through all stages of the recruitment process. Should you require accommodation, please contact Human Resources via email at resumes@raymondjames.ca.