

RAYMOND JAMES®

LICENSED ADMINISTRATIVE ASSISTANT

Nanaimo, BC
Job Posting # 21-044

Douglas Duncan Wealth Management of Raymond James Ltd. is looking for an Administrative Assistant to work with our team of financial professionals in our Nanaimo office. We manage over \$300 million in client assets and provide the highest level of service to our high net-worth clients.

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

The role consists in providing administrative support to a team of two Financial Advisors and outstanding service to our clients. As a key member of the team, the Administrative Assistant's contributions are important to the success of the client relationship with the Financial Advisors, and to the success of the Branch as a whole.

Specifically, you will:

- Support account openings, confirming with the client, following through with signatures, and processing with back office;
- Ensure all client accounts are up-to-date;
- Liaise with corporate back office to complete client inquiries and requests;
- Respond to requests for information;
- Handle incoming and outgoing phone calls with clients;
- Process and follow up on security transactions and transfers;
- Prepare correspondence and reports;
- Maintain Advisor files;
- Deposit client cheques; and
- Other duties as assigned.

To qualify for this opportunity you possess:

- Post-secondary education or an equivalent combination of experience and education;
- Preferably 2-3 years of professional work experience in a related role;
- Successful completion of Canadian Securities Course (CSC), Conduct & Practices Handbook (CPH) and 30-day Investment Representative Training Course or willingness to complete within 2 years;
- Proficiency with MS Office, particularly Word and Excel;
- Experience with Dataphile and Thomson Reuters is an asset;
- Meticulous attention to detail;
- The ability to exercise tact and discretion, as well as handle confidential information;
- Self-starter attributes, motivated and hardworking;
- Excellent verbal and written communication skills;
- Excellent telephone demeanor;
- Adaptability to work in a dynamic and constantly changing environment;
- The ability to prioritize, multi-task, and work within time constraints and follow-up;
- Well-developed interpersonal and customer service skills;
- Problem solving skills; and



- A friendly and professional manner.

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

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 21-044 by June 25, 2021 to:**

Human Resources
Raymond James Ltd.,
E-mail: 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.

