



RAYMOND JAMES®

ADMINISTRATIVE ASSISTANT

Vancouver, BC
Job Posting # 17-041
March 13, 2017

Raymond James Ltd. is seeking an Administrative Assistant to work in our downtown Cathedral Place office for one of the largest investment teams in the country, [the Pinkowski-Allen Financial Group](#). Raymond James Ltd. is one of Canada's leading independent investment dealers offering high quality investment services to Canadians seeking customized solutions to their wealth management needs.

Drawing on at least 2 years previous experience as an Administrative Assistant in a financial services firm, you must have a meticulous attention to detail, possess a positive attitude, and have exceptional interpersonal skills, as you will be dealing directly with clients. The successful candidate must also be responsible, confident, self-motivated and a team player.

Specifically you will be responsible for:

- Handle incoming and outgoing phone calls with clients;
- Prepare and process account opening and update documentation;
- EFT and wire transfer requests;
- Respond to requests for information;
- Prepare correspondence and reports;
- Service clients' general day-to-day requests;
- Maintaining the client database (Salesforce), entering meeting notes and ensuring files are accurate;
- Contact clients to schedule meetings for a busy team of 6 Financial Advisors and manage the team calendars;
- Greet clients as they arrive for meetings and bring them from reception into the office;
- Organize catering for meetings, special events and luncheons;
- Maintain broker files;
- Performing project based work;
- Other duties as assigned.

To qualify for this opportunity you possess:

- A minimum 2 years investment industry experience;
- Post-secondary education;
- Excellent proficiency with Microsoft Office particularly Word, Excel, PowerPoint & Outlook;
- Familiarity with database programs such as Salesforce, CRM, or Maximizer is an asset;
- Excellent verbal and written communication skills;
- Strong organizational skills;
- Meticulous attention to detail;
- Ability to prioritize, multitask, work within time constraints and follow-up;
- Ability to work in a team environment and demonstrate a professional and friendly manner.

This is a full-time position with a competitive compensation and benefits package, including health & dental, life insurance, retirement savings, employee stock purchase program and corporate discounts.



If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 17-041** by March 31, 2017 to:

Human Resources
Raymond James Ltd.
2100 – 925 West Georgia Street
Vancouver BC V6C 3L2
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.