

## PCG SERVICES TRAINING & DEVELOPMENT ASSOCIATE

VANCOUVER, BC or TORONTO, ON

Job Posting # 17-082

May 12, 2017

Raymond James Ltd. is seeking a Private Client Group Services Training & Development Associate to work in our downtown Vancouver office or Toronto 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 general direction of the Manager, Private Client Services, and collaborating with the Vice President, PCG Services the PCG Training and Development Associate is accountable for the successful delivery of process and administration training within the Canadian operations of Raymond James Ltd.

Specifically you will:

- Design, develop and maintain training programs for PCG Services and the branch network;
- Prepare and implement training by using a variety of delivery mechanisms e.g. Media, Webinar, telephone, etc.;
- Monitor the branch support guide and other reference materials on an annual basis to ensure all materials are current and up to date;
- Evaluate the effectiveness of training by measuring and evaluating feedback from course participants;
- Provide 1:1 training on a needs basis;
- Proactively reach out to new branch joiners to ensure they are comfortable with training resources;
- Customize pre-designed course materials as appropriate;
- Oversee the 30 and 90 day training program;
- Provide specific recommendations regarding computer training and orientation for new staff and upgrading the knowledge of existing staff;
- Coordinate the daily activities of the computer education function including scheduling of training sessions and related resources (i.e. videos, CDs, equipment, etc.);
- Provide scheduled and unscheduled absentee desk coverage for other team members;
- Collaborate with team members to maintain intranet training website;
- Travel on short notice to assist with onboarding new Advisors providing preliminary training on Dataphile functionality, the navigation of intranet site (RJNET) and other applications training;
- Other duties as assigned.

To qualify for this opportunity you possess:

- 2 or more years' experience in the Investment Brokerage or Financial Services industry;
- Knowledge of Banking and/or Investment industry policies and procedures;
- Post-secondary education;



- Enrollment or completion of the Canadian Securities Course or the Conduct and Practices Handbook is an asset;
- Experience with Dataphile is be an asset;
- Excellent proficiency with MS Office particularly Word, Excel, PowerPoint and Outlook;
- Exceptional communication skills. Specifically in providing verbal and written instructions;
- Superior customer service skills;
- Excellent collaboration abilities;
- Flexible and a willingness to travel on short notice;
- A good understanding of the procedures and processes supporting Advisors and Sales Assistant roles;
- Well-developed interpersonal skills and the ability to handle confidential information with tact and discretion;
- The ability to work in a dynamic team environment and demonstrate a professional and friendly manner;
- A meticulous attention to detail and accuracy; be flexible and willing to assist others as required;
- Proficiency in French is a definite asset;
- A valid driver's license is required.

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

**Please note that this position will involve travel within Canada up to 50% of the time.**

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 17-082** by May 31<sup>th</sup>, 2017 to:

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