

# RAYMOND JAMES®

## FINANCIAL ADVISOR ASSISTANT

Burnaby, BC  
Job Posting # 18-061  
March 7, 2018

The Muir Investment Team (<http://muironmoney.com/>) at Raymond James Ltd. is seeking an experienced Financial Advisor Assistant to work in our Burnaby office.

As one of the top team at Raymond James Ltd., we believe each team member is crucial to our success. Their contribution is valued, appreciated and regularly rewarded for success and growth. Our goal is to see each member grow in their competencies and make progress in their vocational aspirations. We care about each team member.

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.

Drawing on previous experience in an administrative role in the financial services industry, you will be responsible for providing outstanding client service and administrative support to the Financial Advisor and team. You must be a self-motivated individual with exceptional administrative skills and be honest, dependable and friendly nature.

Specifically you will:

- Assist the Financial Advisor and team with administrative tasks;
- Offer unparalleled customer service;
- Closely monitor day to day transactions;
- Act as a resource person for clients regarding the firm's products, procedures and policies;
- Be responsible for processing and following up on security transactions and transfers;
- Handle incoming and outgoing client phone calls and emails;
- Respond to requests for information in a timely manner;
- Service clients' general day-to-day requests;
- Handle client service issues and problem-solve in a proactive and professional manner;
- Communicate internally with various operational and administration departments;
- Prepare professional correspondence, daily, monthly and annual reports, and client documentation;
- Manage and maintain paperwork; and
- Other duties as assigned.

To qualify for this opportunity you should possess:

- A minimum of 2 years of relevant experience preferably in the investment or banking industry;
- Completion of the Canadian Securities Course as well as the Conduct and Practices Handbook to be IIROC licensed as an Investment Representative is mandatory;
- Proficiency with MS Office, (Word, Excel, PowerPoint and Outlook) and business related software;
- Excellent interpersonal, as well as verbal and written communication skills;
- Adaptability to work in a progressive environment;
- Self-starter attributes, motivated and hardworking;
- A pragmatic and solutions-oriented approach to problem solving;



- Meticulous attention to detail;
- Ability to prioritize, and manage multiple deadlines and tasks;
- Excellent organizational and problem solving skills; and
- Ability to work well within a team environment.

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

If you would like a challenging and rewarding opportunity in financial services, appreciate working on a dynamic and caring team please send a resume and covering letter, **quoting the position and Job Posting # 18-061** by March 21, 2018 to:

Muir Investment Team  
Raymond James Ltd  
**E-mail: [muirinvestmentteam@raymondjames.ca](mailto:muirinvestmentteam@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).

