

# RAYMOND JAMES®

## ASSOCIATE FINANCIAL ADVISOR

VICTORIA, BC  
Job Posting # 19-126

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.

Dorey Wealth Management is seeking a full-time Associate Financial Advisor (IR or RR licensed) to work in our Victoria Private Client branch and be willing to travel as required.

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.

You 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. You will be expected to help service our existing clients as part of our team. 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.

Specifically you will:

- Prepare portfolio reviews and investment management proposals;
- Assist in answering client questions regarding their accounts and financial plans;
- Monitor daily cash balances and help with recommendations;
- Review risk tolerance and asset allocation during portfolio review preparation;
- Follow up on movement of money between client accounts to ensure accuracy;
- Investigate and resolve 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;
- Help with research if you have the experience and knowledge (if not, this would be an area of growth); and
- Help with insurance, financial and estate planning if you have experience and knowledge (if not this would be an 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 RR licensed with completion of the Canadian Securities Course (CSC) and Conduct and Practice Handbook (CPH) Course;
- CFP designation or in the process of obtaining CFP designation is considered an asset;
- Completion of a degree or diploma is an asset;
- Proficiency with MS Office including Word, Excel and Outlook;
- Experience in entering trades is an asset;
- Strong analytical and communication skills;
- Excellent 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.

There is excellent opportunity for growth. This is a 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 #19-126 by September 6, 2019 to:**

Human Resources  
Raymond James Ltd.  
Email: [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).

