Position Posting

Senior Associate, Registered Plans - Registered Plans
Vancouver – Job #7037

Summary

Canaccord Genuity (CG) is a leading independent full-service financial services firm, with operations in two principal segments of the securities industry: wealth management and capital markets. CG is driven by an unwavering commitment to build lasting client relationships – we achieve this by generating value for our individual, institutional, and corporate clients through comprehensive wealth management solutions and investment banking services. We are a leading independent wealth management firm in Canada, and the leading mid-market provider of investment banking advisory, equity research, sales and trading services for corporations and institutions.

We pride ourselves on understanding our clients' needs and finding innovative, bespoke solutions. Our entrepreneurial and friendly team will challenge you to learn and grow every day. We value great work and collaboration and strive to eliminate bureaucratic thinking. We're looking for talented people who thrive in a fast-paced environment and want to have an impact with innovative ideas and best practices.

Come be a part of our Canadian success story and help deliver superior experiences for our clients. At CG, we recognize that diversity across our business strengthens our client relationships and enables more innovative solutions. We strongly encourage applications from all qualified individuals regardless of race, religion, colour, national origin, gender, sexual orientation, age, marital status, or disability status. CG provides an accessible candidate experience. If you need any accommodations throughout the interview process and beyond, please let us know.

Our Canadian operation, Canaccord Genuity Corp., is currently looking for an experienced Senior Registered Plans Associate to join our Registered Plans Department. The successful candidate will be an enthusiastic, client service-oriented individual with 2-3 years of administrative work experience, preferably in the financial services sector.

Responsibilities

- Perform a wide variety of registered plans related tasks in a timely and efficient manner. This will include, but is not limited to, recording, scheduling, and processing transactions in registered accounts (RRSP, RRIF, RESP and TFSA)
- Provide first-line support to advisory teams with regards to registered plan products and processes to ensure policies are being adhered to and regulatory requirements on registered products are met;
- Respond to client requests and inquiries and complete all transactions and record keeping functions with strong attention to detail and accuracy;

- Research internal and external resources to stay informed on regulatory changes, policies, and procedures as they relate to registered plan transactions processing to maintain compliance in all areas of responsibility;
- Work collaboratively with team members across the firm, share best practices to support continuous improvement initiatives, and participate in educating new associates and assistants on registered plan accounts.

Skills & Qualifications

- Comprehensive knowledge of registered products (RRSP, RRIF, RESP and TFSA);
- Solid understanding of the CRA rules for registered plans;
- Polished client service skills and excellent verbal and written communication;
- Attention to detail and ability to prioritize tasks and work efficiently in a fast-paced and client-focused environment;
- Capacity to independently seek out solutions and apply sound judgement in problem solving;
- Strong PC skills including Microsoft Office (Word, Excel, Outlook);
- Experience with Dataphile system is an asset.

To apply, please Click Here. *We recommend that all internal applicants advise their direct manager/supervisor about their interest in other job opportunities prior to sending in their job application.*