Position: Client Associate

Senior Wealth Management group seeks highly skilled Client Associate.

R&R Investment Partners is a wealth management team at CIBC Wood Gundy managing $700 million for a select group of families predominantly in Western Canada. We provide an integrated wealth management experience to help simplify our clients' financial lives, enabling them to live their lives doing what they really love. Our client experience is founded on goals-based financial planning and disciplined investment management combined with the integration of related experts to ensure legacy and philanthropic goals, and tax minimization, which are all highly valued by the families we serve.

The Client Associate is a key member of our team and will help serve our clients by:

- *Having a do whatever it takes approach to wow our clients*

Main Responsibilities

The Client Associate is a self starter working independently and with the lead advisors and team. They are responsible for delivering a five star client experience by successfully achieving the following outcomes:

Relationship Management

- *Promptly answer the phone and handle incoming client requests*
- *Preparing client meeting packages and analytics*
- *Opening client accounts, ensuring client KYC documents are up to date, maintaining proper records*
- *Complete client monthly payments so clients get their monthly "paycheck" on time*
- *Cheerfully interact with clients, accurately completing financial tasks (TFSA, RRSP contributions, and ad hoc withdrawals and deposits) so clients willingly introducing their colleagues, friends and family*
- *Provide an exceptional client experience that makes it easy for clients to want to consolidate their financial affairs*
- *Organize scheduled service meetings with clients*
- *Post team communications on LinkedIn*
- *Keep clients insurance information up to date in Salesforce*
- *Provide tax reports to clients*
- *Have a* ***do whatever it takes*** *approach to wow our clients, as required*

Competencies

The successful candidate will have the following skills and competencies:

1) ***Exceptional relational skills:*** *The desire to serve and do a great job for our clients. Treat them like family.*
2) ***Intelligence:*** *The ability for strategic thinking, the ability to see the big picture and think and guide clients to solve complex problems.*
3) ***Efficiency:*** *The ability to get things done, accurately and proactively.*
4) ***Accuracy*** *and attention to detail*
5) ***Morality, honesty, integrity:*** *Instil confidence in our clients by being a trusted member of the team.*
6) ***Enthusiasm:*** *Has a can-do attitude and a passion for our industry and helping people.*
7) ***A growth mindset:*** *A willingness to improve and get better.*
8) ***Analytical skills:*** *A very solid understanding of spreadsheets, ratios, modelling, valuation, etc.*
9) ***IIROC licensed with three years of experience in the industry****, Insurance license is an asset*