



Example of Associate, RBC Dominion Securities Job Description

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Our company is hiring for an associate, RBC dominion securities. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for associate, RBC dominion securities

- Provide ongoing assistance and support on special projects as determined by management
- Organize seminars
- Attract new HNW clients
- Provide seamless service onboarding new clients
- Investigate and resolve account-related inquiries
- Utilize contact management system for daily task management and client record-keeping
- Assist the Portfolio Manager in preparation for client meetings
- Organize client meetings with Wealth Management specialists
- Assist with projection analysis, portfolio modeling, and tax preparation
- Deliver a consistently exceptional level of client service to a sophisticated clientele

Qualifications for associate, RBC dominion securities

- A deep working understanding of capital markets, equities, fixed income, and alternatives
- Exceptional written skills, and attention to detail
- Language skill preferred – Mandarin / Cantonese
- Experience working in the Financial Industry preferred
- Organizational and administrative skills required to perform activities in a deadline driven environment, working with constant interruptions is essential

