



SOPHIA FINANCIAL
INVEST WITH WISDOM

RAYMOND JAMES®

**ASSOCIATE FINANCIAL ADVISOR/
FINANCIAL PLANNER**
Point Grey – Vancouver

SUMMARY

Are you an experienced financial professional seeking a role in a firm that is committed to inclusion and equality? Do you believe in doing what is right for clients at all times? Do you seek the freedom to help clients without the pressure of sales targets? If so, we want to hear from you.

Sophia Financial Group (www.sophiafinancial.ca) is an independent agency of Raymond James Ltd. that provides wealth management services to high net worth clients and we are growing. Our full-service approach focuses on financial planning and superior portfolio management, education and community outreach. Our distinct culture is built on a shared commitment to exemplary service, the highest ethical standards and our social values are an integral part of our business platform.

We are looking for a mature, experienced Associate Financial Advisor/Portfolio Analyst/Financial Planner to support our growth.

WHAT YOU WILL BE DOING

As a member of our team, you will work in a high-achieving, fast-paced environment, serving a well-established, diverse client base to advance their financial goals.

- Provide gold standard client care delivering proactive service and quality communications to ensure clients are apprised of details related to their accounts
- Assist in managing our team's investment portfolios and execute trades
- Capably utilize software to prepare and present individual financial plans
- Prepare investment policy statements, investment proposals & client review presentations
- Build, monitor and rebalance customized investment portfolios in accordance with client's risk tolerance and to maximize returns
- Assist in research, analysis, asset mix decisions, and investment product selection with an anticipatory mindset
- Execute trades

QUALIFICATIONS REQUIRED

- Investment and / or financial services industry experience

- Must be securities licensed as a Registered Representative with CIRO
- Must hold, be in the process of, or willing to take, an advanced finance or investment qualification such as CFP, CIM, CFA, or CPA; insurance license an asset
- You are “sharp as a whip” with outstanding analytical skills and problem-solving abilities
- You have excellent English communication skills demonstrated in all writing formats as well as in person

WHAT WE OFFER

You are attracted to our community outreach, education programs and values-based business approach.

Our warm and cheerful offices and harmonious team environment on Vancouver’s westside may be a welcome relief to you from a traditional corporate atmosphere. At this stage of your career you are looking at more than just the bottom line. You seek engagement at many levels.

This is a salaried, in-office position.

If any of this strikes a chord, we may be what you are looking for.

TO APPLY

If you are interested in learning more about joining our team, please submit your **cover letter** and **resume** to:

erin.seibel@raymondjames.ca

We recognize the value of a diverse workforce and appreciate the unique skills and special contribution of each employee. We are committed to diversity, equality and accessibility in our recruitment process.

We would like to thank all interested respondents but wish to let you know that we will only be contacting applicants who meet our requirements.