

Associate Financial Advisor Position

Company Name: Rogers Group Financial

Website: <http://www.rogersgroup.com/>

Company Description: Rogers Group Financial is an independent financial services firm owned and operated by its financial advisors. As investment advisors, portfolio managers and insurance agents, RGF Advisors are fully qualified to implement comprehensive solutions. Our independence allows our advisors the freedom to compare available alternatives in the marketplace and recommend what we believe is the best financial plan for your unique circumstances.

Position Title: Associate Financial Advisor

Position Description: This position is intended for individuals who are seeking to further their career by working with a team of advisors.

You will enter the second stage of our three phased development program:

- Phase 2: Analysis and writing financial plans

Primary Job Duties:

- Planning support provided by writing comprehensive financial plans, participating in client meetings and playing a direct role in the client management process.
- Creating, developing and maintaining new and existing client deliverable documents and templates.
- Education - In this stage you are expected to complete your CFP designation.

- Phase 3: Client management

Primary Job Duties:

- Responsible for managing a group of clients under direct supervision of the advisor. This includes conducting meetings, creating and implementing financial plans, and maintaining client service standards effectively and efficiently.
- Education - In this stage you are expected to pursue additional industry standard designations

Each phase includes extensive training, education, and mentoring. Candidates with an educational background in financial planning or who possess relevant work experience may be considered for an accelerated development path.

Requirements:

Educational Requirements

- Canadian Securities Course.
- Conduct & Practices Handbook.
- Diploma, Degree or professional designation in Financial Planning, Business Management or a related area.
- Proficient with Microsoft Office Suite.

Work Experience

- 2 to 5 years experience working in a financial planning environment.
- Securities or Insurance license is required. Candidates with both are preferred.
- Experience working in a process-driven team environment

Other Requirements

Candidates are expected to be strong communicators and hard working individuals with an eye for detail. The ideal candidate will have a relevant educational background coupled with experience advising clients.

Compensation: Commensurate with education and experience.

Position Location: Vancouver, British Columbia

Position Start Date: March 15, 2010 (or sooner if a successful candidate is available).

Application Method: Please e-mail your cover letter and resume to eastaneh@rogersgroup.com. No telephone calls please.