Portfolio Management Assistant

Requisition	R0000184948
Employer	Royal Bank of Canada
Canadian locations	Toronto (Ontario, Canada)
Primary address	600 QUEENS PLATE DR, TORONTO, ON M9W 0A4, Canada
Posted	November 6, 2026
Date in the description	August 19, 2026
Posted deadline	December 31, 2026
Last day to apply	December 30, 2026
Business area	WEALTH MANAGEMENT
Employment status	Regular
Work schedule	Full time · 37.5 h per week
Pay type	Salaried

The position

The Portfolio Management Assistant (PMA) is a role that focuses primarily on supporting the Investment Counsellor in the management of private client portfolios (primarily comprised of pooled funds), relationships, and meetings. It is not an asset selection or analysis role, but an integral role on a small team. This is done through assistance with producing financial plans, portfolio rebalancing per the investment policy statement and preparing/updating Investment Policy Statements. It requires strong tax and financial planning knowledge, in addition to portfolio management knowledge. The PMA will pro-actively identify, investigate and resolve client inquiries and provide the Investment Counsellor with recommendations for resolution of complex situations, as well as assist in the construction of customized investment strategies, proposals and implement & monitor action plans for new funds and portfolio allocations. The PMA will enter trades as directed by the Investment Counsellor, and works closely with the Private Client Associate to assist in the administration of client portfolios. Other requirements include being a self-directed individual with excellent organization skills, strong writing and communication, able to handle large volumes of information, interpersonal skills and critical thinking. For more information please visit: RBC Phillips, Hager & North Investment Counsel,

Responsibilities

- By providing excellence in customer service, you answer all inquiries, update client files when needed, and prepare client presentation materials
- You will also need to prepare meeting materials in advance and attend client meetings, if you wish.
- In addition, you will oversee writing correspondence and customer newsletters, assisting in the preparation of financial plans using RBC proprietary software, and responding to accounting questions.
- You will also help with securities trading as directed by the Investment Counsellor
- Other tasks include helping to develop business activities by: developing and managing marketing lists, helping to present new accounts and preparing new proposals for perspectives.
- You will also prepare client investment policy statements from a model, and you will model, monitor and provide suggestions for rebalancing portfolios.
- A key element of your responsibilities will also be to ensure that the client's mandate and portfolio models are respected.
- Finally, you will assist the Investment Counsellor and the team with any additional ad hoc administrative duties as needed.

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Qualifications

Requirements

- Minimum 2 years in a client who must play a role in a financial institution, including financial planning
- University Degree
- Completion of either CIM or CFA Level 1
- PFP or CFP
- Experience in Trading
- Advanced skills of MS Office (Word, Excel, Power Point)
- Attention to details, strong organizational skills, excellent oral and written skills and technological knowledge

Assets

- Tax planning experience
- Portfolio Management skills
- Successful achievement of CSC

Pay and benefits

RBC teams aim to grow by working together, thinking ahead and giving dependable advice that helps clients and communities prosper. They support one another, develop their potential and strive for outcomes that benefit the communities they serve as well as the bank.

- A total compensation program with competitive pay, bonuses and flexible benefits, plus commissions and stock where applicable.
- Challenging work
- Variety of assignments
- Financial strength and a strong brand
- Prestige
- Management that supports your work and progress

RBC is presently inviting candidates to apply for future vacancies. Applying to this posting allows you to express your interest in future career opportunities at RBC. Qualified applicants may be contacted to review their resume in more detail.

Job Skills

Asset and Liability Management (ALM), Cash Management, Client Counseling, Competitive Markets, Financial Statement Analysis, Investment Management, Investment Risk, Market Risk, New Challenges, Results-Oriented

RBC accepts applications until 11:59 p.m. on the day before the posted deadline.

Our Employment Opportunities

RBC works as One RBC and follows five shared values: putting clients first, integrity, collaboration, respect and excellence. As one of the world’s largest and most successful banks, it sees inclusion and different perspectives as important to continued growth. RBC supports staff in doing their best work, working together, innovating and developing professionally. Its policies and programs foster respect, belonging and opportunities for everyone to create value for clients and communities.

Talent community

People who join RBC’s talent community can receive new postings, career advice and recruitment event updates tailored to their interests.

RBC’s careers portal shares information about career paths and how its teams contribute to client and community well-being.

Search for requisition R0000184948 on the RBC careers portal.

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