Associate Advisor, Wealth Management

Requisition	R0000186894
Employer	RBC Dominion Securities Inc.
Canadian locations	Waterloo (Ontario, Canada)
Primary address	652 ERB ST W, WATERLOO, ON N2T 2Z7, Canada
Posted	September 3, 2026
Last day to apply	December 30, 2026
Posted deadline	December 31, 2026
Business area	WEALTH MANAGEMENT
Employment status	Regular
Work schedule	Full time · 37.5 h per week
Pay type	Salaried

The position

The RBC Dominion Securities (“RBC DS”) branch located in Uptown Waterloo is looking for an experienced Associate Investment Advisor or Associate Advisor to join a Premier advisory team by providing exceptional client service along with investment, wealth management and administrative support. Candidates the role requires at least 5-10 years of experience in the investment field.

Responsibilities

- Providing world-class customer service to our valued customers
- Enhance the client relationship through executing the investment and wealth strategies of the IA along with engaging financial planning and other wealth management resources of the team and RBC DS more broadly
- Effective communications with clients (written and verbal), by telephone, by e-mail and in person
- Use the contact management system for daily task management
- Investment research, analysis and analysis
- Back up on trade execution
- Support IA by identifying and assisting in the growth of new business opportunities
- Help with the development of the team’s investment strategy for clients
- Event planning

Qualifications

Requirements

- At least 5 years of experience in the investment field
- CIRO licensed as a Registered Representative (RR) (Canadian Securities Course/CSC, Conduct and Practices Handbook/CPH, Wealth Management Essentials/WME) or equivalent CIRO licensing courses (Canadian Investment Regulatory Exam (CIRE), Retail Securities Exam (RSE), conduct training and regulatory training requirements)
- Exceptional skills in verbal and written English - excellent communicator on the phone
- Bachelor’s degree from an accredited post secondary institution
- Attention to strong organisational detail and competence
- Ability to successfully multi-task and change priorities mid-stream, when needed
- Advanced Microsoft Office skills (Word, Excel and PowerPoint)

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- Legally able to work in Canada
- Role requires work from office

Assets

- Finance, economy or business degree
- Other professionals in the investment industry designations (such as the CFP, etc.)

Pay and benefits

We thrive on the challenge to be our best, to keep growing, and working together to deliver trusted advice to help out clients thrive and communities prosper. We care about each other, reaching our potential, making a difference to our communities, and achieving success that is mutual.

- A comprehensive total premium program with flexible premiums and benefits with competitive pay
- Managers who coach employees and help them find opportunities to develop.
- Capacity to make a difference and sustainable impact
- Join a collaborative team that works at a high standard and looks for new ways to improve.

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

Client Service, Client Service Management, Decision-making, Interpersonal Relationship Management, Investment Management, Investment Performance Measurement

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 R0000186894 on the RBC careers portal.

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