Associate, Financial Planning - Alberta

Requisition	R0000190508
Employer	Royal Bank of Canada
Canadian locations	Edmonton (Alberta, Canada)
Primary address	199 WEBBER GREENS DR NW, EDMONTON, AB T5T 4K5, Canada
Posted	October 15, 2026
Last day to apply	March 29, 2027
Posted deadline	March 30, 2027
Business area	PERSONAL & COMMERCIAL BANKING
Employment status	Regular
Work schedule	Full time · 37.5 h per week
Pay type	Salaried

The position

As a partner, you provide proactive sales support and customer contact with a value-appropriate team of financial planners. You are responsible for supporting the unit/team in achieving sales objectives by contributing to a differentiated customer experience. In this role, you work with partners across the organization to identify and respond to customer needs and objectives, strengthen customer relationships and facilitate their business with RBC.

Responsibilities

- You are a strategic member of the financial planning team and will work directly with financial planners to provide pre- and post-intervention services and client services and to achieve their financial plan.
- Maximize opportunities to effectively identify client needs, make referrals, expand profitable client relationships, and track and review progress against the teams' annual sales plan. Increase sales enablement for Financial Planners by assisting with preparations for client meetings, and supporting the fulfilment of credit, investments, and everyday banking solutions.
- You activate and educate our clients by proactively leading with advice, serving through digital and leading as digital ambassador that maintains current on technology by building your digital IQ
- Due diligence in all policies and procedures and in areas of correct business risk/identity

Qualifications

Requirements

- Mutual fund accreditation (e.g., Canadian investment funds, or Canadian securities courses)
- Lead a unique RBC advisor with extensive and in-depth expertise in banking, investment and credit, with the ability to meet a strong personal and business consulting experience
- Strong contact routines that proactively establish yours and your financial planning schedule, integrating consistent maintenance and anchoring activities to help the team achieve better results
- Flexibility, eagerness to learn, strong personal ethics and hunger for success
- Ability to work in teams and in autonomy, demonstrating strong collaborative skills
- Ability to leverage your own capabilities, and those of the right partner in our ecosystem, at the right time, to meet the full range of financial needs of the client

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Assets

- Monitoring progress in reporting and maintaining client relationships within the financial sector
- Ability to provide increasingly complex banking, investment and credit advice to personal and business clients
- Home equity lending - Linx experience

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 comprehensive total premium program including competitive pay, premiums and flexible benefits.
- Continuing career development opportunities
- Support for a dynamic, collaborative, progressive and efficient team, along with world-class tools, coaching and development opportunities
- Opportunity to achieve great success and grow your career with RBC

Job Skills

Client Centricity, Communication, Critical Thinking, Curious Mindset

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 R0000190508 on the RBC careers portal.

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