Investment & Retirement Planning Assistant

Requisition	R0000192377
Employer	Royal Bank of Canada
Canadian locations	Chilliwack (Colombie-Britannique, Canada)
Primary address	9296 MAIN ST, CHILLIWACK, BC V2P 4M5, Canada
Posted	November 9, 2026
Last day to apply	November 29, 2026
Posted deadline	November 30, 2026
Business area	PERSONAL & COMMERCIAL BANKING
Employment status	Regular
Work schedule	Part time · 20 h per week
Pay type	Salaried

The position

As an Investment and Retirement Planning Assistant, you support a top producing Financial Planner, Investment and Retirement Planner in meeting sales objectives and related activities by providing value added administrative service and support. You will provide responsive client contact management through telephone, fax and e-mail requests, along with, develop relationships with service partners to ensure operational guidelines are adhered to and transactions are processed efficiently. You manage office routines to ensure efficiency is maintained through availability and effective management of files and records by gathering and preparing material required for presentations, meetings, marketing initiatives, etc.

The workplace is a combination of home offices and branches, based on the needs of the financial planner, investments and retirement planning in the Abbotsford and Chilliwack markets.

Responsibilities

- Provide a service that is more responsive to customer requests for fax, email and telephone
- Provide superior responsive execution and delivery of client transactions/requests
- Identify key referral sources and have strong organizational awareness
- Demonstrate personal commitment to ensure that skills and knowledge are up-to-date
- Respond quickly to customer requests to strengthen customer loyalty and trust

Qualifications

Requirements

- At least 2 years of excellence demonstrated in a service and sales support role in collaboration with a sales team that provides advice and responds to customer requests
- Exceptional customer service skills
- Excellent communication skills, oral/written, good business writing
- Strong organizational skills with the ability to multi-task and prioritize
- Strong IT skills in Microsoft Office including Word, Power Point, Excel, Outlook
- Experience in communications and emerging technologies (i.e. web meetings, social media, digital banking and mobile applications)

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Assets

- Resourcefulness and able to work independently
- Strong and enthusiastic team player who pays attention to details
- Sales, self-motivated, self-managed and prosperous in a fast-paced environment
- Strong skills in problem solving with a sense of urgency
- Knowledge of Royal Bank systems, including the sales and service platform and RBCNet, will be considered an asset

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 flexible premiums and benefits and competitive pay
- Managers who coach employees and help them find opportunities to develop.
- A dynamic collaborative culture where personal initiative and hard work are recognized and rewarded

Job Skills

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.

RBC is accepting applications for an existing vacancy. Qualified applicants may hear from the recruitment team for a more detailed review of their résumé.

Search for requisition R0000192377 on the RBC careers portal.

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