Estate Planning Associate

Requisition	R0000192866
Employer	RBC
Canadian locations	Calgary (Alberta, Canada)
Primary address	335 8 AVE SW, CALGARY, AB T2P 1C9, Canada
Posted	November 24, 2026
Last day to apply	December 11, 2026
Posted deadline	December 12, 2026
Business area	WEALTH MANAGEMENT
Employment status	Temporary
Work schedule	Full time · 37.5 h per week
Pay type	Commission

The position

You will provide support to a team that helps our DS Investment Advisors, PH&N Investment Counsellors and our clients with insurance marketing assistance and support for servicing of in-force policies. Your role on the team is to help with sales & marketing to promote business growth for a successful Estate Planning Specialist.

This is an 18 month mat leave coverage contract position with possibility of being made permanent or extension.

Responsibilities

- Preparation of materials (Insurance Application(s) and accompanying documents, internal point of sale documentation, illustrations and concepts) for EPS meetings with prospects and clients.
- Ensure that new applications are processed in our internal system and sent to the carrier
- Manage pending cases and take appropriate steps to oversee the completion of the case
- Establish relationships with wholesalers, case coordinators and life partner insurers to ensure that the business is managed effectively
- Support and maintenance of an existing service program
- Provide exceptional client service

Qualifications

Requirements

- Minimum 2 years experience in an insurance agency or equivalent role in the financial sector
- Knowledge of life insurance products and life benefits
- Excellent customer service skills
- Experience in meeting tight deadlines and setting priorities; ability to work independently
- High Microsoft and Excel desktop skills
- Registered life insurance, LLQP or willing to obtain within 6 months

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Assets

- Post-secondary diploma considered an active
- High net worth customer service 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 Rewards Program
- 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.

Job Skills

Customer Advice, Client Needs, Customer Service, Customer Service Management, Group Problem Resolution, Long-Term Planning, Multi-Level Communication, Product Services

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 R0000192866 on the RBC careers portal.

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