Wealth Associate

Requisition	R0000193205
Employer	RBC Dominion Securities Inc.
Canadian locations	Edmonton (Alberta, Canada)
Primary address	199 WEBBER GREENS DR NW, EDMONTON, AB T5T 4K5, Canada
Posted	November 20, 2026
Last day to apply	December 3, 2026
Posted deadline	December 4, 2026
Business area	WEALTH MANAGEMENT
Employment status	Regular
Work schedule	Full time · 37.5 h per week
Pay type	Salaried

The position

RBC Dominion Securities' branch in downtown Edmonton is looking for a heritage partner to help implement the team's heritage management strategy.

You will provide quality customer service and help to deepen relationships with existing clients through heritage management activities.

Responsibilities

- Coordinate and prepare heritage management meetings for advisors with their clients/prospects.
- Provide proactive client service with a focus on problem resolution and attention to details. Liaise with various departments for execution, where necessary.
- Respond to client enquiries (account transactions, tax receipt requests, account return, etc.).
- Assist the Advisor team with client onboarding.
- Help with managing incoming communications from clients, advisors and other internal and external partners.
- Support of the consulting team and client through the heritage management process and continued audit of heritage management activities and priorities

Qualifications

Requirements

- Canadian Investment Regulatory Exam, CIRE
- Demonstrated expertise in providing world-class customer services that will be available as professional, warm and friendly to our clients
- Exceptional skills in oral and written communication in English
- Minimum of 2 years of experience in securities, financial planning and/or tax expertise

Royal Bank of Canada Website, © 1995-2026 - Tous droits réservés © 2026 - optimisé par novijob™

novijob.com novijob.com novijob.com novijob.com novijob.com novijob.com novijob.com novijob.com

Assets

- Knowledge of RBC Dominion Securities Systems and Procedures, 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, competitive remuneration, commissions and inventory, if applicable
- Leaders who support your development through coaching and opportunity management
- Ability to make a difference and have a lasting impact
- Working in a dynamic, collaborative, progressive and efficient team
- A world-class financial services training program

Job Skills

Account Management, Client Success, Decision Making, Financial Regulation, Group Problem Resolution, Interpersonal Relationships, Investment Risk Management

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 R0000193205 on the RBC careers portal.

novijob.com novijob.com novijob.com novijob.com novijob.com novijob.com novijob.com novijob.com

Royal Bank of Canada Website, © 1995-2026 - Tous droits réservés © 2026 - optimisé par novijob™