

SPECIALIST – PORTFOLIO OPTIMIZATION AND INTEGRATION

Do you enjoy juggling between investment analysis and business process optimization? Are you passionate about the financial services industry and continuous improvement? Then this position is for you!

Our RGP Investments division is looking for a Portfolio Optimization and Integration Specialist to support financial advisors across Canada by leveraging your expertise in investment and business development. As a specialist, you will play a key role in our clients' success by providing strategic and personalized support while actively contributing to the evolution and continuous improvement of our services.

YOUR RESPONSIBILITIES:

- Support consultants - business growth.
- Manage model and customized portfolios tailored to advisors' needs.
- Provide analytical support to advisors to optimize investment strategies.
- Simplify complex financial concepts and promote their adoption by teams.
- Ensure close coordination with the business growth consultant and the team.

YOU ARE THE RIGHT FIT FOR THIS ROLE IF...

- You are known for your **reliability, proactivity,** and **ability to adapt quickly to change.**
- You have a **strong knowledge of the investment industry.**
- You have **excellent proficiency in English,** both written and spoken, and can communicate fluently in a bilingual environment.
- You excel at **simplifying** and **effectively communicating financial and operational concepts** in a clear and accessible manner.
- You are driven by a genuine **passion for supporting others,** whether assisting advisors or collaborating with your team.
- You show **great initiative** and understand the strategic impact of your role on overall performance.
- You embrace a **growth mindset,** always seeking improvement and innovation.
- You are comfortable with technology and have experience with Salesforce and other digital tools (a plus).

WHY JOIN US?



**A work environment
where you can thrive!**

Office located in Lebourgneuf

A friendly and accessible workspace,
perfect for exchanging ideas and
collaborating with your colleagues.

A rapidly growing team

Join a thriving company where every
team member plays a key role in our
collective success.

A stimulating and motivating environment

You will thrive in a dynamic
environment where innovation and
collaboration are at the heart of
everything we do.

Flexibility and remote Work

The possibility to work remotely for a better
work-life balance. Training will be conducted via
videoconference and/or in person at the office.

Growth opportunities

Here, we value the
development of our talents
and will provide you with the
tools to grow with us.

**Joining RGP Financial Group means being part of a
young, modern, and dynamic team.**

Send us your resume now at
dominic.lessard@standop.ca