



# Client Service Associate Full-Time

Comox Valley  
Courtenay

Tuesday November 4, 2025

---

\$21 - \$25/ hour (\$43,680-\$52,000/Yearly)

---

**Company:** TD Wealth

---

**Industry:** Finance & Banking

---

**Remote/Camp Based Job:** No

---

**How to apply:**

Apply directly at: [https://td.wd3.myworkdayjobs.com/en-US/TD\\_Bank\\_Careers/job/Courtenay-British-Columbia/PIA-Client-Service-Associate\\_R\\_1453588?q=Courtenay](https://td.wd3.myworkdayjobs.com/en-US/TD_Bank_Careers/job/Courtenay-British-Columbia/PIA-Client-Service-Associate_R_1453588?q=Courtenay)

---

**Expiry Date:**

Friday, March 27, 2026

---

**Details:**

In this role, you will provide dedicated specialized administrative support to an Investment Advisor or team of Advisors on diverse assignments. You may also correspond with clients and other branch staff. In this frontline role, your first impressions will leave lasting results on our business and customer experience. In addition, you will:

- Prepare documentation and provide updates to IAs in preparation for client meetings
- Create reports for analysis of client accounts
- Communicate with customers to provide mentorship on products and services, and identify referral opportunities
- Accept/create leads and ensure correct referral coding administration
- Submit marketing pieces for approval, compile client information packages, maintain marketing materials and "Marketing Express" mail-outs
- Familiarize and adhere to compliance requirements, including all aspects of new and existing account documentation and marketing materials
- Provide a high level of client service which includes responding to phone, mail and electronic enquiries based on knowledge of full service brokerage
- Deliver the 'gold standard' client experience at every interaction with team members, colleagues and clients; prioritize and handle own work and consistently exercise discretion
- Adhere to all policies and procedures and maintain a culture and operation of risk management
- Use insights to continually improve individual and team performance for clients
- Participate fully as a team member, continually improve knowledge and keep others informed and up to date about status and progress, issues or other related activities

---

**Qualifications & Experience:**

Willingness to complete the Canadian Securities Course (CSC) and Conduct and Practices Handbook (CPH) to become licensed with the Canadian Investment

Regulatory Organization (CIRO) within 6 months. Strong communication skills with ability to build relationships and work collaboratively, confidentially and independently

---