Client Service Associate
Full-Time

Comox Valley
Courtenay

Wednesday February 18, 2026

$26 - $30/ hour

Company: TD Wealth

Website:
https://td.wd3.myworkdayjobs.com/en-US/TD_Bank_Careers/job/PIA-Client-Service-Associate_R_1453588

Industry: Finance & Banking

How to apply:

Online at https://td.wd3.myworkdayjobs.com/en-US/TD_Bank_Careers/job/PIA-Client-Service-Associate_R_1453588

Expiry Date:

Wednesday, March 04, 2026

Details:

TD Private Wealth Management takes a sophisticated and holistic goals discovery approach to wealth planning and protection to provide highly personalized advice, solutions, and service to clients. TD Private Investment Advice offers clients the chance to create one-on-one relationship with a dedicated and professional Investment Advisor (IA), while maintaining active participation in decisions regarding their investment portfolio. It's a very special and supportive place to begin – and grow – a lasting, progressive, and rewarding career in wealth. Are you admired for your attention to detail, exacting standards and willingness to help others deliver a legendary customer experience to our high value clients? If so, then get onboard for the position of PIA Client Service Associate. 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 •Become familiar with 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 fullservice 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 improving knowledge and keeping others informed and up to date about status and progress, issues or other related activities

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Qualifications & Experience:

•Undergraduate degree or community college diploma preferred •Successful candidates will be required to be licensed as an Investment Representative (IR) with the Canadian Investment Regulatory Organization (CIRO) within 12 months of hire •1–2 years of relevant experience, ideally in banking, administrative roles, or related fields •Strong communication skills with the ability to build relationships and work collaboratively, confidentially, and independently •Knowledge of wealth management and/or operations is an asset •Knowledge of investment products is an asset

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