



Investment Counsellor Associate Investment Counsellor

RBC Private Counsel Inc.

An opportunity for established Investment Counsellors to build on their success with the support of RBC Private Counsel — one of Canada's leaders in discretionary investment management for private clients.

ABOUT RBC PRIVATE COUNSEL

RBC Private Counsel is one of Canada's fastest-growing investment counselling firms, acting exclusively for high-net-worth clients seeking discretionary investment management. Our unique multi-manager approach provides clients with access to a range of world-class investment managers both internally and externally. Currently, we manage client assets approaching \$9 billion through our team of Investment Counsellors, Associate Investment Counsellors and Private Client Administrators in major centres across Canada. In addition, we provide comprehensive wealth management solutions through RBC's team of high-net-worth specialists, which includes private bankers, trust officers, lawyers, accountants and insurance specialists.

OPPORTUNITIES

We are seeking exceptionally qualified and accomplished professionals to provide prudent investment counsel and inter-disciplinary wealth management solutions to high-net-worth clientele. We are currently accepting enquiries from prospective Investment Counsellors and Associate Investment Counsellors. Both positions are key relationship management roles, encompassing investment counsel, risk management, and business development. They both require a high level of teamwork with various groups within RBC to ensure clients receive comprehensive inter-disciplinary services.

- ▶ An Investment Counsellor is the primary relationship manager and will have extensive experience, meet a very high educational standard, and qualify for immediate registration with provincial securities regulators.
- ▶ An Associate Investment Counsellor is a key member of one or more investment counselling teams, supporting Investment Counsellors with portfolio management, client acquisition and relationship management. Candidates must qualify for registration as an Associate Investment Counsellor with provincial securities regulators. Successful development as an Associate Investment Counsellor will lead to the opportunity of becoming an Investment Counsellor.

ADVANTAGES

Joining RBC Private Counsel offers distinct advantages:

Growth trend: The high-net-worth marketplace is experiencing unprecedented growth, expanding nearly 7% between 2005 and 2006, according to the World Wealth Report 2007. RBC Private Counsel is ideally positioned to acquire a disproportionate share of this expanding marketplace as the investment counselling division of Canada's most trusted financial services organization, RBC.

Client focus: Our client-first commitment is facilitated by our unique multi-manager approach, which enables us to recommend the most appropriate investment managers for our clients, from both inside and outside RBC.

Strength of RBC: Through our RBC partners, our investment counselling teams can facilitate most every financial solution imaginable on behalf of our clients, from everyday banking needs to the most sophisticated offshore structures.



ROLE REQUIREMENTS

If you have a passion for helping clients build and protect their wealth, so they can live life to the fullest today and create lasting legacies for tomorrow, we would like to hear from you.

Successful Investment Counsellor candidates will possess:

- › University degree (preferably in Business and/or Economics)
- › Chartered Financial Analyst (CFA) designation
- › Financial Planning designation would be an asset
- › Portfolio management experience (five years+)
- › Five years+ as an Analyst (performing research involving financial analysis of investments)
- › Minimum five years of investment industry experience
- › High degree of PC literacy and experience using industry standard software
- › Ability to communicate with clients about specialized investment, estate, financial, trust, taxation issues including economic conditions
- › Ability to manage complex personal and family dynamics and deal with conflict
- › Highly specialized knowledge and training in business development and sales
- › Mentoring and supervisory capabilities

Successful Associate Investment Counsellor candidate will possess:

- › University degree (preferably in Business and/or Economics)
- › Chartered Financial Analyst (CFA) designation or CIM designation and CFA Level I (with willingness to work towards completion)
- › Financial Planning designation would be an asset
- › Portfolio management experience (three years+)
- › Two years+ as an Investment Advisor or Analyst (performing research involving financial analysis of investments)
- › Minimum five years investment industry experience
- › High degree of PC literacy and experience using industry standard software
- › Ability to communicate with clients about general investment, estate, financial, trust, taxation issues including economic conditions
- › Ability to manage complex personal and family dynamics and deal with conflict
- › Ability to assist with business development and sales
- › Willingness to grow into Investment Counsellor role

TAKE THE NEXT STEP

Please forward your curriculum vitae in strictest confidence by September 30 to:

W. Randy Mitchell, CFA
National Vice-President

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