

# Client Advisor & Banking Advisor

Be more with RBC.



## RBC Client Advisor and Banking Advisor

### What is a Client Advisor?

An RBC® Client Advisor is the face of RBC. Known externally as a Client Service Representative — or CSR — a Client Advisor works on the front lines in the branch, offering the right advice, solutions and the best service possible to clients. Client Advisors typically help with everyday banking transactions such as bill payments, deposits and withdrawals, foreign exchange requests, bank drafts and more. Additionally, they always take the time to answer general banking questions and resolve client issues in a helpful and positive way.

But Client Advisors do more than field client requests. They are also proactive individuals who use their listening skills to spot opportunities that help RBC clients bank better — whether that's saving money on their everyday banking, making the most of their investment options or getting credit support from an RBC specialist. Advisors ask the right questions in order to understand what a client needs, and to connect them with the right product, service or expert within the RBC network.

Client Advisors have excellent customer service and communication skills, individual drive and personal flexibility to work flex hours. What's more, they possess an exceptional eagerness to learn and a determination to succeed in this vital RBC position.

### What is a Banking Advisor?

An RBC Banking Advisor — known externally as an Account Manager — is a warm, genuine individual who is responsible for initiating and building client relationships within the branch. In this position, which is a level up from a Client Advisor, the Banking Advisor takes on more senior responsibilities including proactively engaging with clients in all areas the branch, uncovering banking needs, providing tailored financial advice and identifying advice and referral opportunities. They may also assist clients with everyday banking transactions. As excellent problem solvers and prospectors, they are able to

help positively resolve client issues and uncover additional advice opportunities.

Banking Advisors are passionate about positively impacting their clients' lives by providing exceptional and meaningful financial advice and solutions such as personal/business accounts, credit cards, loans/lines of credit, overdraft protection, mortgages and investments to meet their clients' needs. Goal-oriented and strong relationship builders, they are always earning the right to be our clients' first choice. As a gateway to the extensive RBC network of financial experts, a Banking Advisor asks the right questions to fully understand a client's needs and goals, directing them



to a specialist who can best address their requirements.

The Banking Advisor role is a perfect stepping stone to a career in financial services. Banking Advisors are therefore expected to have — or be willing to obtain — a mutual funds accreditation such as Investment Funds in Canada or the Canadian Securities Course. Personal flexibility, an eagerness to learn and a passion for providing meaningful financial solutions help Banking Advisors thrive in their role, and empower them to have a positive impact on clients' lives.

## What does training look like?

We provide a comprehensive and formal training program, plus additional on-the-job support for all new Advisors. You will get access to a network of peers, mentors, training development experts and one-on-one management coaching; and receive a combination of self-study, virtual and in-class training. Our training sets us apart from the other banks and ensures you can hit the ground running and excel as an Advisor.

## What about benefits?

At RBC, our benefits package is called Total Rewards. The program is built to reflect the principles of choice and flexibility, along with a shared accountability for success that reflects a belief in winning together. You can customize many elements and create a Total Rewards package that's right for you.

In addition to compensation, Total Rewards include:

- Flexible benefits
- Pension plan options
- Savings and share ownership plans
- Work-life balance
- Learning, growth and advancement opportunities
- Employee banking services



## What can I do next?

If you're interested in pursuing this exciting position, apply today at [jobs.rbc.com](https://jobs.rbc.com)



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