



Position Title	Administrative Assistant
Location	Mississauga
Reporting To	Branch Management
Position Overview	To provide support to a high net worth investment management team.
Duties and Responsibilities	<ul style="list-style-type: none">• Answer office phone and oversee client meeting schedule• Prepare documentation for new accounts and maintain client files• Administrative duties relating to managing client accounts• Process and track account transfers to ensure timely and accurate completion• Work with Operations Departments to ensure excellent client service• Keep current with changes in Operations systems and procedures• Issue and deposit cheques to client accounts• Assist and prioritize for three team members• Prepare and maintain a Procedures Manual for their responsibilities
Qualifications	<ul style="list-style-type: none">• Works well individually with minimal supervision and as part of a team• Demonstrates initiative, attention to detail and excellent follow through• Excels at being well organized and maintaining systems• Dedicated to delivering excellent standards of customer service• Ability to prioritize and meet tight deadlines• Assist with marketing and event logistics• Proficient in English with superior verbal and written skills• Proficient in Microsoft Office (Word, Excel, PowerPoint and Outlook)• Comfortable with adopting new systems and technology• Industry experience strongly preferred• Completion of Canadian Securities Course and CPH or intention to complete would be an asset
Education	<ul style="list-style-type: none">• Completion of CSC (Canadian Securities Course) and CPH (Canadian Practices Handbook) would be an asset• College or University degree in related field preferred