



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