RICHARDSON GMP

Position Title	**Assistant**
Location	Burlington
Reporting To	Investment Advisor Team
Job ID	BUR - 001
Position Overview	To provide support to a high net worth investment management team.
Duties and Responsibilities	• 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	• 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 • 5 years Industry experience strongly preferred
Education	• Completion of CSC (Canadian Securities Course) and CPH (Canadian Practices Handbook) would be an asset • College or University degree in related field preferred