



Position Title	Assistant
Location	Calgary
Reporting To	Branch Management
Position Overview	<p>To provide support to a high net worth investment management team.</p> <p>To provide support in all aspects of the business. Specific responsibilities and activities may include:</p>
Duties and Responsibilities	<ul style="list-style-type: none">○ Prepare and process client paperwork○ Answer inbound phone calls○ Analyze administrative data○ Assist with client marketing initiatives
Qualifications	<ul style="list-style-type: none">● Proficient in English, oral and written● Excellent phone and e-mail etiquette, delivering high standards of customer service● Proficient in Microsoft Office (Word, Excel, PowerPoint and Outlook)● Ability to easily learn on computer systems● Organizational skills and ability to prioritize● Ability to work under pressure● Autonomy, initiative and strong attention to detail● Ability to balance time pressures and deadlines with conflicting demands
Education	<ul style="list-style-type: none">● Undergraduate Program, Marketing Preferred