



Position Title	Assistant
Location	Calgary
Reporting To	Investment Advisor Team & Branch Management
Job ID	CGY - 007
Position Overview	<p>The investment management team is seeking a motivated, organized, hard-working self-starter to assist with the day-to-day activities of the business. The applicant will be responsible for assisting with administrative tasks.</p>
Duties and Responsibilities	<ul style="list-style-type: none">• Prepare and process new account documents and client paperwork• Back up for inbound phone calls• Maintain administrative liaison with the various operations departments in back office• Support team members in general administrative duties in the management of client accounts• Assist in the maintenance of up to date records on team CRM• Provide clients with tax slips when requested• Generate ad hoc client reports• Assist with the execution of RRSP, TFSA and RESP contributions/withdrawals as well as tracking government grants• Responsible for monthly/annual payments to clients• Manage client enquiries• Prepare Meeting Agendas and file prep• Other duties as assigned
Education	<ul style="list-style-type: none">• Bachelor's Degree in Business Administration would be an asset• High School Diploma, along with several years business/office experience• Prior work experience in financial services would be an asset
Qualifications	<ul style="list-style-type: none">• Team player with a positive attitude• Detail oriented• Keen interest in administrative tasks• Ability to prioritize• Strong fact-finding and problem-solving skills• Strong work ethic• Highly self-motivated• Leadership and ambition• Ability to work autonomously while exhibiting initiative and attention to detail• Excellent communication and organization skills• Proficient in Microsoft Word and Excel• Willingness to learn new things and expand upon one's knowledge