



Position Title	Associate
Location	Calgary
Reporting To	Branch Management
Position Overview	To provide support to a high net worth investment management team. The Associate will be responsible for team operations management.
Duties and Responsibilities	<p>Development and oversight of team CRM</p> <ul style="list-style-type: none">- Coordinate segmentation and accompanying service offer- Incorporate workflows for client experience, team operation- Unique campaigns with CRM <p>Prioritize team goals</p> <ul style="list-style-type: none">- Coordinate with advisors- According to quarterly projects- Weekly agenda, team meetings- Daily direct flow of work (day to day and special projects) <p>Prioritize Wealth Planning Needs</p> <ul style="list-style-type: none">- Coordinate with Tax & Estate planning on detailed client reports- Oversight of all steps in the planning process. Ensure all steps executed in a timely manner <p>Organize the Client Experience</p> <ul style="list-style-type: none">- Client reviews scheduled, and process followed- Unique client events or client workshops- Regular consistent client communication <p>Expert Administration Issues</p> <ul style="list-style-type: none">- Head office for unique situations- Tax receipt or tax inquiry- Coordinate select client tax package project
Education	<ul style="list-style-type: none">• Proficient with Microsoft Office Suite and Excel• High School Diploma• The completion of the Canadian Securities Course (CSC) and Conduct and Practice Handbook Course (CPH)• Licensed as a Registered Representative (RR) or as an Investment Representative (IR) with IIROC
Qualifications	<ul style="list-style-type: none">• 3 to 5 years' experience in the financial sector• Ability to work under pressure• Autonomy, initiative and attention to detail• Excellent communication skills with client centered focus• Current knowledge of compliance issues published in internal bulletins• Ability to balance time pressures and deadlines with conflicting demands• Organizational skills and ability to prioritize