RICHARDSON GMP

Position Title	**Tax & Estate Planning Administrative Coordinator**
Location	Calgary
Reporting To	Vice President, Tax & Estate Planning
Position Overview	Responsible for maintaining administrative and tracking reports, assisting the department with preparing, organizing and finalizing wealth plans, coordinating event planning, making travel arrangements and performing various general office administrative duties and completing projects as assigned.
Duties and Responsibilities	• Assist in the preparation of wealth planning reports including documentation gathering, entering information in planning software, formatting, proofreading, filing and final preparation of completed reports • Create, update and calculate numerical information utilizing Microsoft Excel • Maintain various performance and tracking reports and review processes to ensure the effectiveness and efficiency of the department is maintained • Correspond with advisory teams in a professional manner with respect to services requested from the department and information requested from clients for the purpose of wealth planning • Maintain and update the Tax & Estate Planning website for requested services, educational updates and other site enhancements • Prepare expense reports and handle travel arrangements for Tax & Estate Planning professionals
Education	• Microsoft Courses • Courses in financial planning would be an asset
Qualifications	• Previous administrative support experience preferred • Experience in financial services preferred
Skills and Competencies	• Advanced knowledge and use of Microsoft Office Suite • Strong verbal and written communication skills • Attention to detail and accuracy • Strong organizational skills • Ability to work independently and as part of a team • Experience working with InDesign would be an asset • Interest in pursuing the Certified Financial Planner (CFP) designation would be an asset • Bilingual (oral and written) would be an asset