



**Position Title**            **Assistant**

**Location**                    Edmonton

**Reporting To**              Branch Management & Investment Advisor Team

**Position Overview**        The ideal applicant will be an active team participant in an expanding high-net-worth holistic wealth management business. The applicant will be responsible for providing administrative assistance to the team as required.

- Duties and Responsibilities**
- Acquire expert knowledge of the documentation process and liaise with operational teams
  - Monitor all pending and outstanding paperwork & administrative requests; diarize to follow up regularly
  - Prepare documents, reports and file in preparation for meetings
  - Expense tracking
  - Provide marketing support to the team as required
  - Overall office organization
  - File and scan documents
  - Organize for in-office meetings
  - Answer incoming phone calls

- Education**
- Office Assistant Certificate would be an asset
  - Business Management/Administration Certificate/Diploma would be an asset
  - Prior work experience in financial services would be an asset
  - University or College (Financial) Degree would be an asset

- Qualifications**
- Exceptionally strong organizational skills
  - Ability to prioritize to meet specific, timely, deadlines
  - Strong fact-finding and problem-solving skills
  - Ability to work autonomously while exhibiting initiative and attention to detail
  - Proficient at multi-tasking
  - Excellent oral and written communication
  - Proficient in Microsoft office programs (Word, Excel, PowerPoint, and Outlook)
  - Prior experience with CRM (Customer Relationship Management) would be an asset