RICHARDSON GMP

Position Title	**Assistant**
Location	Edmonton
Reporting To	Branch Management & Investment Advisor Team
Position Overview	The ideal applicant will be an active team member in a growing high-net-worth holistic wealth management business. The applicant will be responsible for providing all administrative assistance to the team and will be a key point of contact for clients.

Duties and Responsibilities

- Answer telephone calls, gatekeeper duties, find out client needs, direct calls accordingly
- Deliver high standards of service and communication to clients, orally and in writing (email)
- Acquire expert knowledge of the documentation process and liaise with back-office staff
- Request information and documentation from clients in order to open accounts and keep client files up to date
- Monitor all pending and outstanding paperwork; transfers in/out, transfers to accounts, diarize to follow up regularly
- Manage courier services
- File and scan documents, save to team drive and client electronic files
- Transaction Management: process all client account contributions, rebalancing, de-registrations, withdrawal requests and electronic fund transfers
- Assist and provide online access to clients for their accounts
- Schedule and co-ordinate all meetings with clients and team
- Ensure meeting rooms are booked, organized and ready for client meetings
- Greet clients at reception, welcome them by bringing them to meeting rooms
- Maintain and adhere to industry regulations and standards including confidentiality of client and company information

Qualifications

- Exceptionally strong organizational skills
- Excellent oral and written communication
- Ability to prioritize to meet specific deadlines and be adaptable to a changing work environment
- Ability to work autonomously and also within a team while exhibiting initiative and attention to detail
- Proficient in Microsoft office programs (Word, Excel, PowerPoint, and Outlook)
- Understanding of the finance/brokerage industry may be considered
- Experience with Maximizer (Client Relationship Management), Dataphile and/or Croesus would be considered an asset
- Being IIROC licensed would be an asset

Education

- Post-secondary education would be an asset
- Prior work experience in financial services would be an asset