



Position Title	Assistant
Location	Edmonton
Reporting To	Branch Management & Investment Advisor Team
Position Overview	<p>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 administrative assistance to the team and will be a key point of contact for clients.</p>
Duties and Responsibilities	<ul style="list-style-type: none">• Answer telephone calls, gatekeeper duties, find out client needs, direct calls accordingly• Deliver high standard of service and communication to clients, verbally and in writing (email)• Acquire expert knowledge of the documentation process and liaise with back-office staff• Key point of contact for clients when opening accounts and keeping client files up to date including monitoring the status of pending and outstanding paperwork; transfers in/out, transfers to accounts, diarize to follow up regularly• Responsible for organizing files: scanning documents and filing in electronic and paper system• 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 and ensure meeting rooms are booked, organized and ready for client meetings, greet clients at reception and welcome them to our office• Maintain and adhere to industry regulations and standards including confidentiality of client and company information
Qualifications	<ul style="list-style-type: none">• Exceptionally strong organizational skills and attention to detail• Excellent verbal 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• Proficient in Microsoft office programs (Word, Excel, PowerPoint, and Outlook)• Experience with Maximizer (Client Relationship Management), Dataphile and/or Croesus would be considered an asset
Education	<ul style="list-style-type: none">• Post-secondary education would be an asset• Prior work experience in financial services would be an asset