



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