



**Position Title** Receptionist

**Location** Mississauga

**Reporting To** Branch Management

**Position Overview** The Receptionist's role is to provide administrative support to the branch and display a professional manner when dealing with the investment advisors, their team members and clients.

**Duties and Responsibilities**

Reception functions:

- Receive, greet and direct calls and clients
- Sort and distribute incoming mail
- Coordinate branch and client meetings, set up boardrooms
- Accounts payable
- Order office and kitchen supplies and monitor inventory

Administrative functions:

- Receiving and processing cheques, recording credits to client accounts
- Daily deposit at the bank
- Printing and mailing cheques
- Sending daily banking to Advisor Services and keeping clean records for audit
- Receiving and processing certificates deposits
- Monitoring petty cash
- Assist the Branch Administrator monitoring and clearing up the compliance pending list

Branch Functions:

- New account documentation, branch copies
- Accounts payable

**Qualifications**

- High School Diploma
- The completion of the Canadian Securities Course and Conduct and Practice Handbook would be an asset
- 1-3 years working experience
- Experience in the Finance industry
- Eager to learn new skills and adapt to a changing working environment
- Operations familiarity within the brokerage industry
- Familiarity with commonly used programs such as Croesus and/or Dataphile
- Strong Microsoft Office Suite skills
- Strong communication and interpersonal skills
- Detail oriented
- Organizational skills