



**Position Title**                    **Assistant**

**Location**                            Montréal, Québec

**Reporting To**                    Branch Management

**Job ID**                                MTL - 007

To provide support to an investment management team.

**Position Overview**

**Bilingual position requiring excellent knowledge of French and a good knowledge of English.**

**Duties and Responsibilities**

- Support the team in general administrative duties in the management of client accounts
- Request information and documentation from clients in order to open accounts and keep client files up to date
- Maintain administrative liaison with the different operations departments
- Type memos, letters and documents to ensure completion on a timely basis
- Have checks issued for client accounts
- Current knowledge of compliance issues published in internal bulletins
- Manage appointment agenda for team members
- Maintain follow-up of administrative operations to insure proper settlement of demands by informing the proper departments and taking necessary measures when required

**Qualifications**

- **Proficient French, oral and written mandatory**
- Good knowledge of spoken English (written an asset; head-office in Toronto)
- Knowledge of Microsoft Office Suite
- Organizational skills and ability to prioritize
- Ability to work under pressure
- Autonomy, initiative and attention to detail
- Excellent phone and e-mail etiquette, delivering high standards of customer service
- Ability to balance time pressures and deadlines with conflicting demands
- Experience in the financial sector an asset

**Education**

- High School Diploma
- Canadian Securities Course (CSC) not required for this position