RICHARDSON GMP

| | |
|---|---|
| **Position Title** | **Assistant** |
| **Location** | Montreal |
| **Reporting To** | Branch Management |
| **Position Overview** | To provide support to a high net worth investment management team |
| **Duties and Responsibilities** | • Support the team in general administrative duties in the management of client accounts<br>• Request information and documentation from clients in order to open accounts and keep client files up to date<br>• Maintain administrative liaison with the different operations departments.<br>• Type memos, letters and documents<br>• Act as contact person for clients concerning products, procedures and policies of the Firm<br>• Notify the team of tender offers, redemptions and reimbursements etc.<br>• Follow up on client trades to ensure proper settlement and delivery by informing the appropriate departments to take the necessary measures<br>• Process and monitor transfers to ensure completion on a timely basis<br>• Have cheques issued for client accounts |
| **Qualifications** | • Proficient in English & French, oral and written<br>• Proficient with Microsoft Office Suite<br>• Organizational skills and ability to prioritize<br>• Ability to work under pressure<br>• Autonomy, initiative and attention to detail<br>• Current knowledge of compliance issues published in internal bulletins<br>• Excellent phone and e-mail etiquette, delivering high standards of customer service<br>• Ability to balance time pressures and deadlines with conflicting demands<br>• 1 to 3 years' experience in the financial sector an asset |
| **Education** | • High School Diploma |