RICHARDSON GMP

Position Title	**Associate**
Location	North York
Reporting To	Portfolio Manager
Job ID	NY - 003
Position Overview	To provide support to a high net worth investment management team. The Associate will be responsible for reporting and analysis.

Duties and Responsibilities

- Support the Portfolio Manager in general administrative duties in the management of client accounts
- Prepare client reviews, reports and spreadsheets on request and on a consistent basis
- 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
- Act as contact person for clients concerning products, procedures and policies of the Firm
- Notify Portfolio Manager of tender offers, redemptions and reimbursements etc.
- Follow up on client trades and transactions to ensure proper settlement and delivery by informing the appropriate departments to take the necessary measures
- Monitor all pending transfers to ensure completion on a timely basis

Qualifications

- Proficient in English, oral and written
- Proficient with Microsoft Office Suite, with superior skills in Excel
- Organizational skills and ability to prioritize
- Ability to work under pressure
- Autonomy, initiative and attention to detail
- Good knowledge of investment accounts and operations (RRSPs, TFSAs, RESPs and non-registered accounts)
- 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 is a must

Education

- University degree or College diploma is a must
- The completion of the Canadian Securities Course and Conduct and Practice Handbook is an asset
- Registered as Investment Representative (IR) with IIROC is an asset