



Position Title **Branch Assistant**

Location North York Branch

Reporting To Branch Management

Position Overview

This is a full-time 12-month contract entry level position where the Branch Assistant will receive training and education required to move into an Investment Advisor assistant position within 24 months. During this training period, the trainee is to provide administrative support to the Branch Administrator and Branch management team and to display a professional manner when dealing with the investment advisors, their team members and clients.

Reception Functions:

- Receive, greet and direct calls and clients
- Sort and distribute incoming mail
- Set up boardrooms for branch & client meetings
- Accounts payable
- Order kitchen supplies, monitor inventory and kitchen maintenance

Duties and Responsibilities

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
- Assist reception with coordinating building facilities maintenance
- Assist Branch Management team as required
- Review branch invoices
- Back up for cage

Qualifications

- Proficient in English, oral and written
- Proficient with Microsoft Office Suite
- Organizational skills and ability to prioritize
- Autonomy, initiative and attention to detail
- Excellent phone and e-mail etiquette
- Ability to work efficiently, multi task and maintain professionalism in a high pressure environment
- Experience in the financial sector
- Strong communication and interpersonal skills