



<b>Position Title</b>	<b>Assistant</b>
<b>Location</b>	Saskatoon
<b>Reporting To</b>	Branch Management & Investment Advisor Team
<b>Job ID</b>	SAS - 001
<b>Position Overview</b>	<p>The ideal applicant will be an active team participant in an expanding high-net-worth holistic wealth management business. The applicant will be responsible for providing administrative assistance to the team as required.</p>
<b>Duties and Responsibilities</b>	<ul style="list-style-type: none"><li>• Acquire expert knowledge of the documentation process and liaise with back-office staff</li><li>• Monitor all pending and outstanding paperwork; diarize to follow up regularly</li><li>• Process all client banking related transactions</li><li>• Request transfers and follow up to completion</li><li>• Set up client accounts on dividend reinvestment program as requested</li><li>• Process all client account contributions, de-registrations, withdrawal requests, and payment changes</li><li>• Attend all branch monthly meetings &amp; Assistant meetings report to team on any pertinent developments</li><li>• Provide marketing support to the team as required</li><li>• File and scan documents</li></ul>
<b>Education</b>	<ul style="list-style-type: none"><li>• High School Diploma, along with 1 year business / office experience</li><li>• Business Management Certificate / Diploma would be an asset</li><li>• Prior work experience in financial services would be an asset</li><li>• Completion of the Canadian Securities and Conduct and Practice courses</li></ul>
<b>Qualifications</b>	<ul style="list-style-type: none"><li>• Exceptionally strong organizational skills</li><li>• Ability to prioritize to meet specific, timely, deadlines</li><li>• Strong fact-finding and problem-solving skills</li><li>• Ability to work autonomously while exhibiting initiative and attention to detail</li><li>• Proficient at multi-tasking</li><li>• Excellent oral and written communication</li><li>• Proficient in Microsoft office programs (Word, Excel, PowerPoint, and Outlook)</li></ul>