RICHARDSON GMP

Position Title	**Administrative Assistant**
Location	Toronto
Reporting To	Branch Management
Position Overview	To provide administrative support to an Investment Management Team.

Duties & Responsibilities

- Prepare documentation to open accounts & keep client files up to date.
- Assist in running reports and preparing meeting packages.
- Assist in booking meetings and setting up conference calls.
- Process & track account transfers to ensure timely completion.
- Administrative duties in the management of client accounts.
- Prepare and maintain a Procedures Manual for their responsibilities.
- Work with Operations Departments to ensure client service.
- Keep current with changes in Operations systems and procedures.
- Notify Associate/ Investment Advisor of reorg/ optional dividend notices.
- Issue and deposit cheques to client accounts.
- Prepare and mail Quarterly Progress Reports to clients.
- Answer telephone calls and ensure client service.
- Assist in monthly or yearly mailings to clients.
- Assist in tracking client preferences.
- Assist the team in running varies daily or monthly internal reports for review.

Qualifications

- Initiative, attention to detail, diligent, good follow-through.
- Ability to prioritize daily tasks.
- Works well individually with minimal supervision & as part of a team.
- Enjoys being well organized and maintaining systems.
- Dedication to delivering high standards of customer service.
- Interest in the financial sector an asset.
- Proficient in English, oral and written.
- Proficient in Microsoft Office (Word, Excel, PowerPoint and Outlook).
- Ability to easily learn computer systems.
- Will need to complete a Kolbe Test
- Dataphile experience in running reports