



Position Title **Assistant**

Location Toronto

Reporting To Branch Management & Investment Advisor Team

Position Overview The ideal applicant will be an active team member in a growing high-net-worth holistic wealth management business. The applicant will be responsible for providing administrative assistance to the team and the clients.

Duties and Responsibilities

- Experienced and comfortable with online marketing campaigns, creating digital invites/save the dates to events, posting relevant articles/updates on social media to target specific audiences
- Experienced with social media marketing (LinkedIn mainly)
- Experienced with digital/graphic design to aid in the creation of invitations/promotional materials
- Experienced with Excel to create invitation lists using information from LinkedIn and contact lists
- Responsible for sending out online invites/client birthday cards
- Responsible for completing Subscription Agreements and processing client wire transfers
- Responsible for organizing catered luncheons (obtaining credit card information, providing purchaser with invoices, organizing setup with kitchen staff)
- Basic dataphile functions (address searches, etc.)
- Deliver high standards of service and communication to clients, orally and in writing (email)
- Acquire expert knowledge of the documentation process and liaise with back-office staff
- Request information and documentation from clients in order to open accounts
- Monitor all pending and outstanding paperwork; transfers in/out, transfers to accounts, diarize to follow up regularly
- Manage courier service documents to and from clients
- Schedule and co-ordinate meetings with clients and team
- Ensure meeting rooms are booked, organized, greet clients at reception, welcome them by bringing them to meeting rooms

Education

- Post-secondary education would be an asset
- Prior work experience in financial services

Qualifications

- Exceptionally strong organizational skills
- Ability to prioritize to meet specific deadlines
- Ability to work autonomously while exhibiting initiative and attention to detail
- Proficient in Microsoft office programs Word, Excel, PowerPoint, and Outlook (experience with Maximizer, Dataphile and /or Croesus would be an asset)