



Position Title **Assistant**

Location Vancouver - Downtown

Reporting To Branch Management & Portfolio Manager 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 all administrative assistance to the team and clients.

What Richardson GMP Offers: This role offers benefits and a group RRSP. We offer opportunity for growth, learning in a team atmosphere and a well-located office.

Duties and Responsibilities

- Acquire expert knowledge of the documentation process and liaise with back-office staff
- Support the team with administrative duties in the management of client accounts
- Support the team with marketing initiatives, campaigns and client events
- Distributing reports to team members as required
- Support the team in preparation of client reviews and presentations
- Request information and documentation from clients, opening accounts, maintaining and updating client files
- Deliver high standards of service and communication to clients, orally and in writing (email)
- Answer telephone calls, find out client needs, direct calls accordingly
- Monitor all pending and outstanding paperwork
- Cash Management: debit check, process all client account contributions, rebalancing, de-registrations, withdrawal requests and electronic fund transfers

Education

- Post-secondary education would be an asset
- Prior work experience in financial services would be an asset
- The completion of the Canadian Securities Course would be an asset

Qualifications

- Exceptionally strong organizational skills
- Excellent oral and written communication
- Ability to prioritize to meet specific deadlines
- Ability to work independently, while exhibiting initiative and attention to detail and accuracy
- Proficient in Microsoft office programs (Word, Excel, PowerPoint, and Outlook)
- Experience with Dataphile and Maximizer would be considered an asset