



Position Title **Branch Assistant**

Location Winnipeg

Reporting To Branch Management

Job ID WPG - 001

Position Overview The Branch Assistant's role is to provide administrative support to the branch and display a professional manner when dealing with the investment advisors, their team members and clients.

Duties and Responsibilities

Administrative functions:

- Receiving and processing cheque daily deposits, recording credits to client accounts and keeping clean records for audit
- Printing and mailing cheques
- Receiving and processing certificates deposits
- Monitoring petty cash
- Assist the Branch Administrator in monitoring and clearing up the compliance pending list

Branch functions:

- New account documentation
- Assist Branch Administrator with I.T. setups and tech support for branch personnel
- Back up to the Branch Administrator
- Additional duties as per assigned

Reception functions (back up to Winnipeg Receptionist):

- Receive, greet and direct calls and clients
- Sort and distribute incoming mail
- Assist to coordinate branch and client meetings, set up boardrooms
- Accounts payable
- Order office and kitchen supplies and monitor inventory

Qualifications

- The completion of the Canadian Securities Course and Conduct and Practice Handbook would be an asset
- 1-3 years working experience in the Finance industry
- Eager to learn new skills and adapt to a changing working environment
- Ability to work efficiently, multi task and maintain professionalism in a high pressure environment
- Operations familiarity within the brokerage industry
- Familiarity with commonly used programs such as Dataphile
- Strong Microsoft Office Suite skills
- Strong communication and interpersonal skills
- Detail oriented
- Organizational skills