

Job title: Financial Planning Administrator

Branch name: Assante Vancouver Centre, an independent branch of Assante Financial Management Ltd. and Assante Capital Management Ltd.

Branch location: Downtown Vancouver

Contact: corp@assante.com

Application Close Date: January 31st, 2022

Job description

[Assante Vancouver Centre](#) branch is a premier wealth management firm with their office in downtown Vancouver. With over 30 years in the industry, our branch offers our clients a personalized and comprehensive planning experience.

Four of our highly successful and professional planners are merging to become a Super Practice and are looking to add a Super Administrative to the support team. They are looking to hire a Financial Planning Administrator to provide primary support for the Senior Admin team, Financial Planners as needed and contributing to the overall success of the team. This is a tremendous opportunity for an individual who wants to bring their proven administrative experience to new professional levels getting to join a newly formed team who is setting the pathways for their destined success as a bigger practice. In addition, this group sees the importance in having created a working culture where there is never a wrong time to catch up on how your colleagues weekend went, have a laugh over a funny story or take a personal moment to refresh the mind and top up your coffee!

This is a full-time position available immediately. Job will require working on premise.

Duties & Responsibilities:

- Play an integral role as part of a team with the Senior administrators;
- Assist in the completion of required materials and tasks before, during and after client meetings;
- Assist with form preparation, statement requests and other administrative requirements as required;
- Coordination of investment and insurance transactions/paperwork, including investment trades, account opening and compliance documents;
- Tracking and follow up to ensure completion of investment and insurance transactions;
- Follow up with head office, insurance or fund companies for information as required;
- Maintain a strong understanding of industry regulations, policies & procedures, and compliance requirements;
- Provide holiday coverage of other administrative team members;
- Marketing or event support;
- General administrative duties:
 - Use business tools and technology to organize team's efficiencies and organization
 - Seek to improve current systems & processes
 - Meetings, appointments and professional development booking for advisors
 - Help organize data, information and files in File Servers, Team Manuals and CRM.

Experience and Qualifications

- Minimum of two years of administration experience in financial services sector;
- Preference given to someone who worked in a similar role in client service and/or financial administration;
- Working knowledge of investment products and plans a requirement.

Skills & Abilities

- Prioritization - Ability to take direction and work from multiple people often at once and understand and communicate expectations in terms of completion times and priority;
- Client service focus - great demeanor, go above and beyond;
- Proactive – looking to take on responsibilities that allow everyone to focus on their highest and best use of time;
- Team oriented – Helpful, encouraging and supportive personality, as part of a team;
- Precision - Ability to maintain a high level of accuracy and a strong attention to detail;
- Communication - Strong and professional communication skills both written and verbal;
- Compliant - Understanding of back-office procedures and compliance in a MFDA or IIROC environment;
- Application Efficiencies - Highly proficient in Word, Excel, Outlook and Salesforce CRM;
- Technical - Strong computer and technical skills in a Windows/PC environment.

Education/training:

- Post-secondary education; or relevant work experience;

Thank you to all those that apply. Unfortunately, we will not be able to reach out to all applicants and will only be in contact with those that meet all the requirements of this position.