

Part-time administrative assistant: Financial Services Industry

Excellent entry level opportunity within the financial services industry. Seeking a highly organized individual who is interested in a part-time opportunity to help shape a leading Wealth Management practice located in Campbell River. The individual must be detail- and service-oriented. Prior experience in the financial services industry is not required, all training will be provided, but previous administration experience in a setting where confidentiality was necessary is preferred.

The position will start January 2023. The hours are Monday to Thursday from 9:00 am to 2:30 pm, excluding statutory holidays. The successful candidate will not be required to work during spring break, for approximately one month during the summer and during Christmas break, in alignment with the lead consultant's client meetings schedule. This role is perfect for someone who has experience taking accurate notes, can convert notes into an action plan and can handle completing multiple tasks daily before a deadline.

Your responsibilities will include, but will not be limited to:

- Attending financial planning meetings with the consultant and taking detailed and accurate notes, including actions to take after the meeting
- Entering notes into our client relationship management software
- Create tasks in a timely manner for team members to follow so they are processed before market close
- Follow post meeting procedures to maintain compliant files
- Electronic scanning and filing of documents
- Greeting clients as they arrive for their scheduled meeting
- Other administrative duties as required by the team

The successful candidate will possess the following qualifications:

- Administrative diploma or equivalent experience
- Strong computer skills and fast typing speed
- Strong verbal and written communication skills
- Customer service orientation
- Excellent organizational and time management skills
- Good listener
- Enthusiastic
- Ability to maintain client confidentiality at all times

What you will be experiencing:

- Positive and inclusive work environment
- Team leader who values team members and encourages them to grow
- Competitive vacation time and schedule allowing you a greater work/life balance
- Access to group benefits for medical, dental, disability and life insurance
- The ability to make a difference in people's lives

This position will start as a 6 month contract with the possibility of conversion into a permanent position.

Please submit cover letter for why you believe you would be right for this role in addition to your resume to sonia.edwards@ig.ca