Client Service Assistant/Associate: Financial Services Industry

Excellent opportunity within the financial services industry. Seeking a highly organized and motivated individual who is interested in a long-term opportunity to help shape a leading Wealth Management practice located in Campbell River. The individual must be detail- and service-oriented. This position will be evolving as the practice changes and the candidate gains more knowledge in financial planning. It will be more administrative in nature at the beginning, morphing into client facing tasks (meetings and advice giving) over time. Prior financial planning experience is not required, all training will be provided. Willingness to learn, grow and help people with their finances are must haves!

The position will officially start mid-September 2022. This role is perfect for someone who has experience in financial services or in administrative or client service capacity and is looking to work in an environment where they can leverage and hone multiple skills. It requires full-time hours. We are open Monday to Friday and closed on statutory holidays.

Your responsibilities will include, but not be limited to:

- Receiving client inquiries on behalf of the Advisor and determining appropriate course of action
- Proactively resolving client issues, concerns and request
- Processing new business including completing and submitting applications
- Assisting in the preparation of a prospect or client file prior to meetings
- Tracking open items and bringing them to completion
- Maintaining updated client files and database

The appropriate candidate will possess the following qualifications:

- Business Administration education or other education in a relevant business discipline or equivalent experience
- MFDA/AMF or RR IIROC license and Insurance (or the ability to obtain it before start date – 2 courses to complete online with approximately 50 hours of studying each, which will is possible to obtain before mid-September)
- Past experience in an administrative role or in the financial services industry
- Strong computer skills in the MS Office Suite (Outlook, Word, Excel, Power Point)
- Strong verbal and written communication skills
- Customer service orientation, with a demonstrated ability to professionally interact with clients, on the phone and in person
- Excellent organizational and time management skills, with the ability to quickly adapt to ever-changing priorities/time restrictions
- Knowledge of social media an asset

In addition, the appropriate candidate will possess the following attributes and will be able to provide examples of how they demonstrated each:

- Self-starter who takes initiative and can work independently
- Good listener
- Problem solver with an ability to anticipate and understand future steps necessary to accomplish tasks
- Enthusiastic
- Flexible and willing to adapt and evolve

What you will be experiencing:

- Positive and inclusive work environment
- Team leader who values team members and encourages them to grow
- Competitive wages: starting above $50,000/ year, evolving to six figures over time when more responsibilities are taken on
- Profit sharing when the business meets monthly goals (the better the team does, the more you will earn)
- Access to group benefits for medical, dental, disability and life insurance
- The ability to make a difference in people's lives
- Team leader who encourages healthy work/life balance with 3 weeks of paid vacation to start with
- The ability to deduct some work-related expenses such as: home office, vehicle expenses related to driving to work, etc.
- A starting bonus for completing the courses required

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