

Administrative Assistant (Non-Licensed), Wealth Management – Abbotsford – Job # 3357

Summary

Canaccord Financial Inc. is a leading independent, full-service financial services firm, with operations in two principal segments of the securities industry: wealth management and global capital markets.

Since its establishment in 1950, Canaccord has been driven by an unwavering commitment to building lasting client relationships. We achieve this by generating value through comprehensive investment solutions, brokerage services and investment banking services for our individual, institutional and corporate clients. Canaccord has 49 offices worldwide, including 32 Wealth Management offices located across Canada. Canaccord Genuity, the international capital markets division, operates in Canada, the U.S., the U.K., China, Hong Kong, Australia and Barbados.

Canaccord Genuity Corp. (Canaccord Genuity), Canaccord's Canadian operations is looking for an energetic Administrative Assistant to join our Wealth Management team in Abbotsford.

Responsibilities

- Assist Investment Advisor with a range of administrative, marketing and customer service duties;
- Assist Investment Advisor with processing and confirming client transactions;
- Organize events and seminars for clients, prospects and external experts;
- Answer phones, client inquiries and email client information;
- Proactively initiate contact with clients for a variety of reasons;
- Assist to develop and maintain relationships with our clients' other professional advisors (i.e.: accountants, bookkeepers, lawyers);
- Perform required job duties in a fast paced environment with high demands of quality, accuracy and professionalism;
- Open and maintain client files and accounts, shared file documents and website;
- Prepare client files for appointments;
- Manage transfers;
- Prepare and send weekly physical and electronic client communications;
- Provide customer service support;
- Provide assistance with other projects and initiatives as required, other duties as assigned.

Skills & Qualifications

- Minimum 2-3 years of administrative experience (more would be an asset), preferably in the investment industry;
- Minimum completion of high school. Post-secondary education preferred, but not required;
- CSC and CPH an asset;
- Professional, responsible and able to adapt to a variety of tasks;
- Demonstrate a high level of written and verbal business communication skills, and superior customer service skills;
- Intermediate computer skills: good working knowledge of Microsoft Office programs. Experience with Maximizer an asset;
- Must be detail-oriented, organized, and hard-working;

- Demonstrated ability to meet deadlines and work under pressure, with a strong ability to multi-task;
- Strong initiative and ability to work effectively without supervision;
- Excellent communication and interpersonal skills;
- High level of integrity and ethics;
- A sense of humor.

Qualified applicants are invited to submit a resume and covering letter including salary expectations. All applications will be held in strict confidence. To apply, please visit our [Careers Site](#).

In order to be considered for employment at Canaccord, candidates selected for interviews will be required to show proof of citizenship, permanent residence or eligibility to work in Canada with no restrictions.

We wish to thank all candidates for their interest but only those applicants selected for an interview will be contacted. No phone calls please. Thank you for your understanding.