

Career Opportunity

WHAT: Administrative Assistant, Financial Services, Permanent Fulltime
WHEN: Immediate
WHERE: Vancouver – Broadway and Burrard

Arbutus Financial is a comprehensive financial services firm, serving the needs of individuals, companies, business owners and their families. Located in Vancouver, we have a thriving practice, brilliant and thoughtful clients, and a fun and dynamic work environment. Our team is committed to our clients and to each other both personally and professionally. We hold values that are Professional, Accountable, Committed and Thorough – this is our PACT. We are world class at what we do, how we treat each other and our clients and what we contribute to our community. We take our roles seriously and enjoy a joyful team spirit, as we work together to nurture the needs and dreams of our clients.

As a key part of the Arbutus Financial family, you will be responsible for all major administrative aspects of the firm. These include; **processing** insurance and investment transactions, **Follow-up** to confirm completion and accuracy, **database** management, client **contact**, **written** correspondence, filing and other **administrative duties**.

You will work closely with other team members in the servicing of our clientele.

Some natural gifts you possess are resourcefulness, accuracy, strong organizational and analytical skills, high capacity for learning, flexible, ability to work independently and as part of a small team, kind, warm, sense of humour and above average computer skills. As well, you will be a self-starter with the ability to make choices that are in service of the team and our clients. You will be a finisher, with great pride in your quality of work. Finally, you will be a clear and professional communicator with a desire to write, report or represent Arbutus Financial in various ways.

Major Responsibilities and Duties

1. PROCESSING

Ensuring all investment and insurance paperwork is accurately completed. Taking copies and forwarding originals to appropriate financial institutions. Timely handling of all paperwork. Ability to meet multiple deadlines under pressure.

2. FOLLOW-UP

Systematic follow-up as appropriate to ensure client transactions and requests are completed accurately and on time. Investigate and resolve inquiries, and refer them to the financial advisor when appropriate. Intuitive approach to resolving issues promptly and effectively.

3. TECHNOLOGY

Quick, accurate and effective with technology. Managing and maintaining with high accuracy our Maximizer CRM database. Competency with MS Office, Dataphile, and other software tools.

4. CONTACT

Proactive, polite, courteous, and professional client contact, by phone, email and letter. Strong verbal skills. Welcoming to clients when they arrive at our office. Personable, warm and friendly.

5. WRITTEN

Professional and courteous writing style applied to all correspondence. Development and application of standardized communication processes. Familiarity with MS Office. Very accurate with correct spelling and proper use of grammar.

6. FILING

Filing of all client documentation, filing of all financial institution information.

7. OTHER ADMINISTRATIVE

Preparation for Client meetings, handling of mail, courier and fax, maintaining office supplies. Maintain and keep current, AFS Procedure Manual, in conjunction with other staff, outlining step-by-step instructions for all major procedures

Strengths

- You strive for **accuracy** when completing daily activities, including but not limited to, filing, preparation of paperwork and recording of information.
- You love being **organized** to the extent of knowing the workflow in process, and ensuring deadlines are met as required.
- You are clear on how to **prioritize** projects, daily work and assignments.
- You know how to **ask for help** or more time to meet milestones and deadlines.
- You understand **accountability** in the completion of tasks assigned.
- You will work with established **procedures** as outlined in the AFS Procedure Manual, and be supported through ongoing team training.
- You will thrive on **communication** with financial advisors and staff on a regular basis to keep them informed of the status of work items.
- You pride yourself in your **proficiency and knowledge** in the operation and procedures of software applications required for your position.
- You **excel** in the operation and procedures of such software as MS Office, Maximizer, Dataphile, and other core investment, insurance and financial planning software.
- You are naturally **resourceful and creative** in seeking out answers from various sources, both internal and external.
- You will **maintain** strategies and procedures to effectively manage electronic and print information.
- You know what to do, how to be and when to make the best choice for yourself, the team, the client and the community where you work, live and play.

Compensation is commensurate with experience and abilities. This includes an attractive base salary, a great work environment, and additional recognition for commitment and performance.

If this full-time position with Arbutus Financial is of interest to you, please email your resume and cover letter to Dana Russell – drussell@arbutusfinancial.com Thank you.