Administrative Assistant

Job Overview

As the Administrative Assistant, your role is to provide support to the advisor team, maintain efficient and effective day-to-day operations and transactions in the office and ensure that the client's experience with the company meets or exceeds their expectations.

Responsibilities:

- Ensure efficient and effective daily operation of the office
- Greets clients in person and over the phone, respond and redirect inquiries via phone and e-mail
- Actively contact clients to schedule meetings (virtual/in office)
- Prepare forms, materials and financial reports for client meetings
- Complete meeting follow-up activities, such as preparing paperwork, sending documents, and tracking tasks for completion
- Handle client account administration, including client inquiries and requests
- Responsible for account administration, documentation and order entry
- Handle confidential documents with the utmost discretion ensuring compliance with internal and industry regulatory requirements
- Responsible for ensuring all databases are updated and maintained
- Complete bank deposits, mail and courier
- Responsible for general office maintenance including ordering supplies
- General office administrative duties as assigned

Qualifications:

- Post-secondary education
- Demonstrate a professional and friendly manner
- Excellent verbal and written communication skills in English
- Relevant experience in the financial sector and/or administrative experience
- Excellent proficiency with Microsoft Office, particularly Word, Excel, PowerPoint and Outlook
- Strong organizational skills
- Meticulous attention to detail
- Ability to prioritize, multitask, work within time constraints and follow-up
- Ability to work in a team environment
- Ability to learn quickly new technologies and programs
- Strong math, analytical and problem-solving abilities

What we offer:

Opportunities for growth, within the role to expand your overall responsibilities, move into other roles (Licensed Assistant, Branch Manager, Financial Planning Assistant, Investment Funds Representative, Licensed Life Insurance Agent, Certified Financial Planner)

Flexible schedule within core operational hours

Compensation:

$17/hr; 40-hour work-week

Group RRSP

Life insurance, Critical Illness and Long-Term Disability benefits

Health Spending Account

Employee Assistance Program

Experience:

Administrative: 2 years (preferred)

Financial services: 1 year (preferred)

Work remotely:

No

Location:

Blenheim, ON

COVID-19 precautions:

Personal protective equipment provided or required

Social distancing guidelines in place

Virtual meetings when possible

Sanitizing, disinfecting or cleaning protocols in place

How to Apply:

Email resume to: hr@mbifinancial.com

Deadline:

Until position is filled