

PRS JOB #	2037
JOB TITLE	BROKER'S ASSISTANT – Financial Services
JOB LOCATION	Vancouver
REMUNERATION	Competitive base salary, performance bonus, and employee benefits
ABOUT THE COMPANY	<p>Our highly experienced financial advisors across Canada have been carefully selected based on high standards of excellence and integrity. They tailor client wealth plans with no incentive to use proprietary products or investment vehicles.</p> <p>Unlike the large investment institutions, our client's team embodies a philosophy of independent, unbiased financial advice with an unwavering commitment to delivering true wealth management, offering harmonized advice that intricately weaves defensive portfolio construction, income planning and projecting, tax minimization planning, estate preservation, and trust management, all with a continuous focus on risk management.</p> <p>If you have some experience in the financial services sector and can perform at a high level but want to 'learn the business' from a leading expert, this may be the right career move for you!</p>
JOB DESCRIPTION	<p>The key focus of this role is to provide administrative support to one of the company's key Portfolio Managers, and support his list of key clients.</p> <p>The core duties of this role include, but are not limited to, the following:</p> <p><u>General & Administrative Support</u></p> <ul style="list-style-type: none"> - Take ownership of the admin aspects of the PM's business activities - book meetings, problem solve and handle a diverse range of client relations issues - help manage the PM's key business pillars: reporting, client services, portfolio performance, and transparency - understand and manage the industry-required paperwork and compliance tasks - Receipt and distribution of mail, and other office admin duties - If the hired candidate has the right financial services certification, they can be more involved with market trades <p><u>Required Skills and Experience</u></p> <ul style="list-style-type: none"> - 2+ years of financial services industry experience, ideally with focus on stocks and mutual / hedge funds - Completion of the Canadian Securities Course (CSC) and / or a Canadian Mutual Funds license (or similar) would be an asset, as this license allows the BA to speak with clients about trades - 2+ years of Office Admin experience, using MS Office (Word, Excel, Outlook), Email and DropBox - An organized, reliable, diligent and independent worker who can anticipate what needs to be done, and get it done properly and on time, perhaps even before the PM asks – learn to anticipate his needs to manage his business - Excellent verbal and written English communication skills
CANDIDATE QUALIFICATIONS & COMPETENCIES	

CANDIDATE 'FIT'	A 'quick study', problem solver, and self-starter, a top notch assistant who doesn't need to be told what to do and how to do it twice, and they can think 'outside the box' to get the work done well and efficiently. Ethical, entrepreneurial, smart, a team player, great English verbal and written communication skills, patient with clients, sensitive to privacy.
HOW TO APPLY	Please email your resume (cover letter optional) to info@philiprecruitment.com <i>We thank all applicants for their interest, however, only those selected for an interview will be contacted.</i> <i>If this is not the right time or role for you, but you suspect it could be a great opportunity for a qualified candidate, feel free to forward this information to them and have them contact us directly.</i>