

Senior Client Service Administrator

Alitis has a strong history of success as an independent provider of managed portfolios and is fast becoming recognized in the field of alternative and private investments that include mortgages and real estate.

We are seeking a full time, permanent Senior Client Service Administrator for our Campbell River office. The successful candidate must have well developed critical thinking, task and project management skills; confidently project mature leadership and team building capabilities and demonstrate a passion for excellence in client service. Your cheerful disposition, professional attitude and previous administrative experience within the financial services industry working with mutual funds or investment products is key. Supervisory experience is preferred but not essential if leadership qualities can be demonstrated through experience gained outside of the workplace. The role will encompass various aspects of back office administration and requires strong verbal and written communication, ability to effectively prioritize workload, and excellent customer service skills with a high level of accuracy. Must be comfortable liaising with senior management in providing regular reporting of ongoing activities. Effective leadership and mentorship, ability to multi-task and delegate, as well as work independently within a team environment requires a positive, motivated and confident self-starter.

Clients are the core of our business and this role requires an individual who is willing to go the extra mile in providing outstanding professional customer/client service.

JOB DESCRIPTION

- **Administration:**

- o Admin Team Lead – provide oversight and support while tracking and monitoring all Admin staff activity
- o Client Documentation (Account Opening, NFU, Pension Transfers, Estates, Corporate Accounts, etc.)
- o Order Processing & Trade Execution
- o Record Maintenance & Data Reconciliation – CRM Software, Trading System (Dataphile), Reporting System (Client Portal)
- o General Adviser Support

- **Other:**

- o Compliance Support
- o Producing management level reports and ongoing updates on the overall performance of the team
- o Liaising with other departments & professionals (Accountants, Lawyers, etc.)

EXPERIENCE REQUIREMENTS

- Understanding of Mutual Funds or investment industry
- 5 years' experience, with 2 years in a supervisory role in financial services/administration, preferably Wealth Management
- Post-secondary degree or equivalent
- All Microsoft Office products – Will work with Word, Excel, Outlook, OneNote daily
- Experience with Dataphile & Salesforce an asset



SKILLS & ATTRIBUTES

- Team building – Build & support administration team as a whole and as individuals
- Strong back bone & ability to prioritize – Needs to manage requests from all organizational levels
- Technologically inclined – Must have strong computer, telephone, print/scan/fax skills
- Communication, written & oral - Email, telephone, Skype & other communication with team members, clients and other professionals in other locations, able to build relationships remotely
- Positive/Motivator/Self-starter – Must work well autonomously, while still considering team support and workload
- Willingness to travel to Victoria approximately every two months for two days
- Keen attention & organization – Notes & other documents must be clear, easy to follow and thorough with high level of accuracy

Interested applicants should submit a resume and cover letter to abaskin@alitis.ca.

We thank all who apply but only those considered to be suitably qualified will be contacted for further consideration.

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