

## Senior Client Service & Operations Manager

We are growing and looking for a new team member at our waterfront office in beautiful Campbell River. Clients are the core of our business. In this new full-time role, the successful candidate will oversee a team of administrators committed to going the extra mile for an outstanding service experience, provide support to the Chief Operating Officer and Chief Compliance Officer for daily practices and ongoing process and infrastructure enhancements. 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. If you 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, this role is a perfect fit.

### RESPONSIBILITIES AND DUTIES

This position reports to the Chief Operating Officer and has responsibilities in four key areas: Management, Administration, Client Support and Compliance Support. The role includes attending occasional client events outside of typical business hours, and travel between Campbell River and Victoria. Occasional travel elsewhere may be expected, for meetings with service providers or attendance at training seminars.

While activities will vary through the course of the year, key responsibilities include the following:

- Develop and maintain in-depth knowledge of all required policies and procedures to ensure all operational tasks are completed on time and according to compliance and regulatory requirements
- Oversee, coach, mentor and train direct reports with a view to creating Client Service champions, fostering career development and personal growth amongst the team
- Support Chief Operating Officer to: enhance daily practices within operations; expand infrastructure; and develop ongoing performance metrics for continuous improvement
- Be a team contributor for satisfactory completion of administrative tasks, including: client documentation and communication; order processing and trade execution; record maintenance and data reconciliation; general adviser support; and communication with outside professionals
- Support Chief Compliance Officer in overseeing name scan procedures; transaction activity review; and new account documentation pre-screening
- Maintain Operations manual and related guidance documents

### EXPERIENCE AND SKILLS

- 5 years' related Mutual Fund or Investment Industry experience, with 2 years in a management role in financial services/administration, preferably Wealth Management
- Professional designation, post-secondary degree or equivalent
- Excellent verbal and written communication skills
- Ability to effectively prioritize workload for self and others
- All Microsoft Office products – Word, Excel, Outlook, OneNote
- Experience with Dataphile & Salesforce an asset

Please send resume and covering letter outlining relevant experience and qualifications with salary expectations to [careers@alitis.ca](mailto:careers@alitis.ca). We thank all who apply. Selected candidates will be contacted for an interview.

