

Job Vacancy – Client Operations Administrator

Full-Time | Permanent | In-Office

Campbell River, BC

Who we are

Located in beautiful Campbell River, BC, Alitis Investment Counsel is a boutique investment firm focused on outstanding customer service, intelligent financial strategies, and a hands-on approach. Created in 2009, Alitis was born out of a need for a new investment strategy to help investors survive market fluctuations. Now focusing on alternative investments, like private real estate, private equity and private mortgages, Alitis has revisited safeguarding clients' portfolios to offset market volatility and protect hard-earned returns.

The firm proudly manages over \$460 million in assets, has over 20 team members, and has offices in Campbell River, Comox and Victoria.

The opportunity

We are looking for our next phenomenal team member for the role of Client Operations Administrator to join our Campbell River office.

We're seeking a dedicated individual who thrives in providing exceptional service and seamless support for the day-to-day operations of the firm. As the Client Operations Administrator, you will assist with the internal operational requirements for both the Client Service team and the Fund Operations. You will play a pivotal role in ensuring we meet our regulatory requirements while assisting in the development of technology and processes to allow for efficient operations and growth of the firm.

Your work will be varied and will often have competing priorities. This role will interact with clients and other stakeholders, and the ideal candidate will thrive in a fast-paced environment and expertly handle the fluctuating workloads.

Alitis is unable to provide any sponsorship and applicants must be able to work in Canada for any employer in a full-time, permanent capacity without sponsorship.

A day in the life...

- Provide flexible and timely support to the Head of Client Operations and CCO
- Support the Chief Compliance Officer (CCO) with monthly regulatory requirements
- Complete daily reconciliations
- Support with development and implementation of client service and fund operation processes
- Support with the development and implementation of technology and system processes
- Assist with fund operations
- Oversee client reporting and testing, including preparing monthly statements
- Help develop training materials and support internal team training when needed
- Assist with client-facing tasks as needed
- Provide outstanding customer service in all interactions with both internal and external stakeholders, clients, and vendors
- Ad-hoc support to the client service team

What you bring

- Minimum 3-5 years' experience in an administrative role
- Prior experience working in the financial services industry or similarly regulated industry will be considered an asset
- Experience with working with and/or implementing Salesforce and/or MAKO
- Experience working with Microsoft Office products, including Microsoft Teams
- Confidence to speak with clients, colleagues and vendors in person, by phone or by email
- Excellent customer service skills
- Excellent organizational and time management skills, with the ability to prioritize and work to tight deadlines in a fast-paced environment
- Solutions-focused and ability to understand and work with data analytics
- Ability to problem solve, use good judgement, and maintain confidentiality

Compensation

\$52,000 to \$62,000 CAD - annual salary

Alitis Investment Counsel also offers a competitive salary, team bonus, paid time off, and a comprehensive group benefits program, including an employer-funded group RRSP.

How to apply

Sound like a fit? Send your resume with your name + **Client Operations Administrator with Alitis** in the subject line to careers@reimaginework.ca.

We come from a range of backgrounds and diverse lived experiences – this makes us better at what we do. We strongly encourage applications from all people including those from marginalized communities, such as BIPOC, LGBTQ2s+, and people with disabilities.

Alitis is an equal opportunity employer. We are committed to creating a diverse environment. All applicants will receive consideration for employment without regard to race, colour, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, or age

We can't wait to meet you.

We thank all candidates for their applications; however, only shortlisted candidates will be contacted.

Please note that we are unable to support work visas of any kind at this time. We thank you for your interest!