

Credential[®]

Credential Financial Inc. (**Credential**) is a national wealth management firm providing MFDA and IIROC dealer services, online brokerage, and insurance solutions to over 225 organizations and more than 1,300 advisors. Our mission is to empower positive growth through wealth management leadership, valued advice, and outstanding service—for our partners, for their people, and for ours.

We currently have a need for a **Temporary Corporate Actions Administrator** in our Operations department for an 8 month contract.

This position will be responsible for assisting in the process and reporting of reorganizations, offers, name changes, and any other corporate actions within Credential, for our Credit Union Partners and select Investment Advisors.

Expected Contributions:

- Co-ordinate and review all Canadian Depository Services (CDS) bulletins daily
- Identify (through Dataphile) any position that is holding a security going through a re-organization
- Notify investment advisors holding securities that are going through a corporate action, providing a response deadline.
- Track all bulletins that have been instructed by the investment advisor, indicating a form of action
- Process all mandatory and voluntary corporate actions affecting client accounts
- Responsible for manual DRIP processing which is vulnerable to market risk
- Provide weekly updates to the Senior Corporate Actions Administrator on all pending offers not paid
- Ensure the ledger is balanced with all mandatory and voluntary corporate actions on a daily basis
- Ensure all proxy related materials are kept up to date and voted through the necessary channels
- Ensure internal manuals are current and updated to reflect changes in company policy, industry regulation and system/procedure changes

Experience and Skills Required:

- 2 years of experience in a Broker/Dealer office environment, Dataphile and CDS background is an asset
- Post-secondary education in a related field
- Successful completion of the Canadian Securities Course or IFIC Operations course would be an asset
- Excellent verbal and written communication, at both individual and group level
- Ability to work independently to achieve required objectives, within company and regulatory requirements
- Self-motivated and results driven
- Strong attention to detail and accuracy
- Proven ability to work well under pressure and in a fast-paced environment
- Strong customer service orientation
- Strong organizational, time management and administrative skills

A career with Credential means being part of an organization dedicated to your success. It means belonging to a group of talented individuals who live our values—partnership, innovation and community—every day. Our amazing people and dynamic culture and an exceptional rewards and benefits package are the essence of what sets Credential apart. Visit our website at credential.com to learn more about our Company and apply for this excellent opportunity to become a member of our team.