Investment Assistant – Vancouver

This year, Odlum Brown celebrates its 94th anniversary as an independent, employee-owned, full-service investment firm. We are honoured to be recognized as one of Canada's Best Managed Companies for 18 consecutive years. In British Columbia, we have also been named an Employer of Choice.

CULTURE AND VALUES
We are very proud of the vibrant culture that we have built and sustained for many years. It's the way we do things, how we make decisions and what defines which behaviours work and don't work – it's what makes up our DNA.

Our values are the cornerstone of our culture, a set of principles that provide a compass for our actions and unify us as a team.

PEOPLE
We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers and every other variety of person you can imagine. You will work with really interesting people and make great friends, too.

COMMUNITY
We are serious about supporting the communities where we live and work. We are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT
Continuous learning matters. We are committed to providing career-long support for learning and growth.

We currently have an opportunity for a registered Investment Assistant to join a team in our Vancouver office.

AREAS OF RESPONSIBILITY

- Various aspects of general administration.
- Coordinating client account documentation and follow-through to account opening.
- Preparation and tracking of account transfers.
- Assistance with client outreach including e-mail, client correspondence and telephone communication.
- Preparing daily, weekly and monthly reporting.
- Some executing of mutual fund, equity and fixed income trades.
- Tracking financial planning for clients and preparing basic plans.
- Preparing marketing materials.

QUALIFICATIONS AND EDUCATIONAL REQUIREMENTS

- Intermediate knowledge of MS Word, Excel and Outlook required.
- Post-secondary education, previous administrative experience in the investment industry and completion of the CFP are assets.
- Completion of the Canadian Securities Course and the Conduct and Practices Handbook Course to meet the qualifications necessary to be approved as a Registered Representative.

COMPETENCIES AND PERSONAL ATTRIBUTES

- Strong verbal and written communication skills.
- Comfortable making proactive client calls.
- Strong analytical and organizational skills, with the ability to manage multiple priorities.
- Detail-orientated.
- Client service focused – committed to exceeding client expectations.
- Discipline, drive and accountability.
- Relationship building skills.
- Team orientated – willingness to take on challenges and provide input to evolve the business.

We have a really great team and have room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this job, we invite you to submit a cover letter and resume to hr@odlumbrown.com by **November 17, 2017**.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.