# New Accounts Administrator – Vancouver

This year, Odlum Brown celebrates its 98th 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 22 consecutive years and as one of Canada's Most Admired™ Corporate Cultures.

**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. In 2020, Odlum Brown was the recipient of the Canada's Volunteer Award in the Business Leader category for British Columbia and the North. This national recognition by the Canadian government is the result of our team members' actions and continued support for various causes and organizations in our communities. 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.

**THE OPPORTUNITY**

**We have an opportunity for a New Accounts Administrator to join our award-winning firm in the Vancouver office.**

This role reports to the Supervisor, New Accounts and Document Management and works closely with our Investment Advisors, Assistants and other departments within our Client Services operations.

You will be partnered with the Team Lead and work in a collaborative environment within the New Accounts and Document Management team. You will be responsible for providing exemplary service to clients and advisory groups by ensuring new and existing account information is complete and accurate, in accordance with regulatory compliance. The ideal candidate is a critical thinker with exceptional attention to detail, combined with strong communication skills and solid investment industry experience.

**RESPONSIBILITIES**

- Review high volume of new and existing client account forms and update client account information
- Set up, update and reconcile client account fees in accordance with fee model and structure
- Process client account documentation with accuracy and in accordance with regulatory compliance
- Provide customer service and administrative support to Investment Advisors and Assistants
- Deliver client service excellence by responding to inquiries accurately and timely
- Ensure standard operating procedures are followed and service level agreements are met in a fast-paced, service-driven environment
- Maintain up-to-date knowledge of fee structure models to administer account fees
- Identify opportunities to streamline processes for operational efficiencies and collaborate with team members to document new and existing processes
- Engage in continuous learning and development to increase knowledge as an account fee expert
- Participate in cross-functional department reporting, audit and review projects

**KNOWLEDGE AND EXPERIENCE**

- Minimum of two years of investment industry experience in New Accounts, Client Services, Compliance or similar function
- University graduate with a Finance, Accounting or Business degree is an asset
- Proven experience of serving clients in a professional services environment
- Exceptional attention to detail and skilled at working efficiently and accurately
- Strong organizational skills with ability to prioritize important and time-sensitive tasks
- Self-starter with solid work ethic; eager to learn and take on new tasks and responsibilities
- Strong interpersonal and relationship-building skills with ability to work independently and within a team
- Excellent verbal and written communication skills
- Experience with the Broadridge Dataphile, PureFees platform or similar bookkeeping system is an asset
- Intermediate proficiency in MS Office (Word, Excel and Outlook)
- Familiarity with the investment industry and/or completion of the Canadian Securities Course or other investment related courses is an asset

Our team is growing, and we've got 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 12, 2021**.

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

As part of fulfilling our responsibility to ensure a healthy and safe workplace, and in alignment with public health measures, Odlum Brown has a mandatory vaccination policy for all team members working on site at any Odlum Brown office. Our firm requires all team members to be fully vaccinated by October 25, 2021.

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.