

# Credential<sup>®</sup>

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 **Processing Administrator (Transfer & Follow Up)** in our Operations department.

Reporting to the Supervisor of Processing, you would be responsible for following up on transfer requests, dealing with credit union representatives and ensuring accurate daily updates on internal systems/databases.

The Processing Administrator (Transfer & Follow Up) interacts daily with other individuals in Operations as well as our Service Centre, credit unions and external financial institutions. Continuous improvement is front of mind and the incumbent will be expected to contribute to and/or support ideas for improved efficiencies.

## **Expected Contributions:**

- Follows up on transfer-in requests in progress with fund companies and other financial institutions within SLAs.
- Provide clear and concise notes on OSM System so all readers can be current on status
- Communicate with credit union representatives and external financial institutions on delayed/rejected transfers-in requests via phone for CAM and CSI/CD transfers
- Ensure proper protocol when delaying requests, notes are clear and concise when using laserfiche, OSM, Univeris and/or Dataphile with relevant updated information from internal and external sources.
- Uses all pertinent systems (laserfiche, OSM, Univeris, Dataphile) properly in compliance with company policy and industry regulation
- Foster an environment of continuous improvement
- Demonstrate an ability to meet or exceed partner & client expectations in day-to-day dealings.
- Exercise sound judgment when balancing the needs of our partners against the needs of the business

## **Experience and Skills Required:**

- Minimum high school graduation.
- Minimum one year experience in an administrative capacity, preferably in the Mutual Fund or Financial Industry.
- Background in the Credit Union System is an advantage
- Extremely detail oriented
- Self-motivated individual
- Excellent communication skills, both oral and written
- Highly organized and a team player
- Excellent customer service 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](http://credential.com) to learn more.