

# 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 **Temporary Registered Plans Administrator** in our Operations department on a 4 month contract.

The Registered Plans Administrator is responsible for a number of duties relating to registered products, including the processing and maintenance of payments from income plans, and the general auditing of registered nominee plan accounts within Credential Financial. The position entails daily interaction with Credit Unions, Mutual Fund Companies, 3rd party Dealers and Internal departmental staff, providing both processing and administrative support.

## **Expected Contributions:**

- Responsible for processing client withdrawals (including non-registered, RRSP, RRIF, Home Buyers, Life Long Learning, and locked in accounts) applicable withholding tax, and fees
- Responsible for ensuring income plan payment instructions are processed accurately and timely
- Receives, reviews and processes new account setup documentation for locked in plans & income plans
- Assists with audit and projects relating to Registered Products and ancillary products
- Reviews related documentation to ensure they meet both company and government policy and legal requirements
- Research and promptly resolve any errors or discrepancies for registered plan activity
- Handles inquiries and correspondence regarding all general activities and procedures of the Registered Product offered
- Ensures internal manuals are current and updated with changes in company policy, industry regulation and system/ procedure changes

## **Experience and Skills Required:**

- 3 years' experience in an administrative capacity, preferably in the Mutual Fund or Financial Securities Industry
- Background in Registered Products and applicable legislation experience is required
- Univeris and/or Dataphile operating system knowledge and experience and a background in the Credit Union System an asset
- Excellent verbal and written communication and interpersonal skills
- Solid analytical, organizational and problem-solving skills with the ability to handle multiple tasks with the appropriate attention to detail
- Ability to set priorities and meet deadlines
- Highly self-motivated and results driven
- Demonstrates the ability to work calmly, accurately and effectively in a fast paced environment
- Superior customer service with the ability to quickly identify and resolve problems to the satisfaction of all parties
- Ability to work independently as well as in a team environment
- Intermediate computer skills in MS Word, Excel, Outlook, Access

*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.*