Canaccord Genuity

Position Posting

New Accounts Administrator, New Accounts
Vancouver – Job # 7007

Who we are:

Canaccord Genuity (CG) is a leading independent full-service financial services firm, with operations in two principal segments of the securities industry: wealth management and capital markets. CG is driven by an unwavering commitment to build lasting client relationships – we achieve this by generating value for our individual, institutional, and corporate clients through comprehensive wealth management solutions and investment banking services. We are a leading independent wealth management firm in Canada, and the leading mid-market provider of investment banking advisory, equity research, sales and trading services for corporations and institutions.

We pride ourselves on understanding our clients' needs and finding innovative, bespoke solutions. Our entrepreneurial and friendly team will challenge you to learn and grow every day. We value great work and collaboration and strive to eliminate bureaucratic thinking. We're looking for talented people who thrive in a fast-paced environment and want to have an impact with innovative ideas and best practices.

Come be a part of our Canadian success story and help deliver superior experiences for our clients. At CG, we recognize that diversity across our business strengthens our client relationships and enables more innovative solutions. We strongly encourage applications from all qualified individuals regardless of race, religion, colour, national origin, gender, sexual orientation, age, marital status, or disability status. CG provides an accessible candidate experience. If you need any accommodations throughout the interview process and beyond, please let us know.

Our Canadian operation, Canaccord Genuity Corp., is currently looking for a motivated, efficient, and team orientated individual with superior accuracy and attention to detail, to join our New Accounts team in Vancouver as a New Accounts Administrator.

Responsibilities:

- Process and monitor KYC new account approvals;
- Open manual client and internal accounts;
- Process and monitor KYC acknowledgement emails to ensure trading is available for specific new accounts;
- Set-up Electronic Funds Transfer requests;
- Process client address changes;
- Process IA change requests;
- Set-up client online access requests;
- Close accounts;
- Maintain our database with the client information from their updated client documentation;
- Maintain and process all mail returns;
- Maintain accuracy in our client database;
- Act as a support to the document administrators, cross training on their function and providing support as necessary.

Skills & Qualifications:

- Knowledge of the brokerage industry and previous experience in a back-office environment an asset;
- Data entry experience;
- PC skills: MS Office (Word, Excel, Outlook);
- Excellent organizational and time management skills;
- Detail-oriented and accurate;
- Ability to work in a fast-paced, team orientated environment;
- Strong customer service skills;
- Proven ability to work under pressure;
- Experience with Dataphile & Hummingbird an asset.

We will provide reasonable accommodations upon request for candidates taking part in all aspects of the recruitment and selection cycle.

Qualified applicants are invited to submit a resume and covering letter including salary expectations. All applications will be held in strict confidence. To apply, please Click Here. *We recommend that all internal applicants advise their direct manager/supervisor about their interest in other job opportunities prior to sending in their job application.*

Upon offer, candidates are required to show proof of citizenship, permanent residence or eligibility to work in Canada with no restrictions.