



Administrative Assistant – Financial Services (2+ years of experience)

Harbourfront Wealth Management is an industry leader and a rapidly growing organization that's looking for a passionate and high performing individual to join a top performing Portfolio Management team based out of South Surrey, BC. The position will require high attention to detail and the ideal candidate should have industry experience. Drawing on at least 2-years of previous experience at a financial services firm, the candidate must have meticulous attention to detail, possess a positive attitude and have exceptional interpersonal skills. The successful candidate must be self-motivated and be able to perform unsupervised.

About Harbourfront

Harbourfront Wealth Management Inc. is an employee owned firm and IIROC registered securities dealer with offices across Canada. Discipline, knowledge and a reluctance to accept mainstream thinking are the characteristics which define the truly successful. The firm specializes in providing holistic wealth management solutions for mid to high net worth individual which includes customized, back tested portfolio construction, financial income and cash flow audits, pension style asset management and tax & trusts solutions.

You will be responsible for:

- Enhancing advisor's effectiveness by providing information management support
- Foster and support client relationships by liaising with clients, responding to requests and proactive problem solving;
- Prepare monthly/quarterly/annual reports, client correspondence and taking ownership of project work;
- Process and follow up on security transactions and transfers;
- Open accounts and manage documentation requirements;
- Handle incoming and outgoing phone calls with clients and respond to requests for information;
- Organising and coordinating all conference calls & webinars
- Perform administrative duties as required relating to general office operations including clerical functions, meeting organization, telephone reception
- Coordinating & booking travel arrangements, and
- All other executive assistant responsibilities as directed by Mr. Forman



HARBOURFRONT WEALTH MANAGEMENT INC.

The ideal candidate for this position has:

- ✓ Minimum of 2-years investment industry experience;
- ✓ Proficient with Microsoft Office particularly Word, Excel, PowerPoint & Outlook;
- ✓ Proven verbal and written communication skills;
- ✓ Ability to learn quickly and identify opportunities to add value;
- ✓ Strong organizational skills;
- ✓ Meticulous attention to detail;
- ✓ Superior customer service skills;
- ✓ Ability to prioritize, multitask, work within time constraints and follow-up;
- ✓ Ability to work in a team environment and demonstrate a professional and friendly manner.

If you have any of the following, consider it an asset:

- Experience working with a Securities Brokerage firm

How to apply:

This is an exciting role with potential for growth. If you are interested in this opportunity, please send an email to: GQuayle@harbourfrontwealth.com. Please send your resume in a *.pdf format with the subject line:

“<YOUR NAME> - Admin Assistant application”

To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company. Employment is contingent on the satisfactory completion of a pre-employment background check.