



**JOB TITLE:** Client Experience Associate

**LOCATION:** Montreal

**STATUS:** Full-time, Regular

**REPORTING TO:** CEO, Highgate

### **COMPANY OVERVIEW**

We're an independent, Canadian-owned and operated wealth management firm, known for our client-centered family office approach. Highgate is a compelling option for families seeking unbiased investment solutions, professional management, and unparalleled service. We aim to build lifetime relationships, deliver bespoke solutions and superior service. We service clients across Canada from our offices in Montreal, Toronto, and Vancouver.

### **POSITION OVERVIEW**

Highgate Group Inc. is a subsidiary of Echelon Wealth Holdings Inc. Highgate is currently looking for a Client Experience Officer to join our team in Montreal. This role will support business operations and high management initiatives, establish and maintain strong client relationships, and perform required administrative tasks related to marketing, client service and relationship management.

### **KEY RESPONSIBILITIES**

- Actively build strong working relationships across all levels within and outside the group by maintaining a working knowledge of the business environment, keeping management informed, responding to business needs and providing practical solutions
- Monitor, screen, respond to and escalate incoming messages as appropriate with tact, discretion and diplomacy
- Proactively manages the CEO's time, schedule and planning
- Lead overall scheduling, preparation and co-ordination for executive-level meetings (both internal and external), including planning of travel arrangements
- Record, prepare and distribute meeting minutes
- Preparation of expense reports, claims and reconciling credit card statements
- Manage and administrate documentation, information, and execute duties including filing, copying and faxing.
- Review, administer and follow-up on all Compliance, credit and debit-related queries.
- Provide excellent client service to all inquiries.
- Maintain files on an ongoing basis (Account opening forms, KYC updates, Compliance queries and Reports)
- Implement and administer a CRM and gather pertinent client data to build maintain the database
- Any other administrative duties as required.

**REQUIREMENTS**

- Experience working within regulated financial services industry as Admin/Sales Assistant to Investment Advisors is strongly preferred
- Ability to work quick and under strict deadlines
- Strong planning, organizational and time management skills with the ability to prioritize tasks efficiently
- Exceptional interpersonal skills when interacting with clients and internal colleagues, including senior management and senior financial professionals
- Understands the importance of Compliance with established operating procedures and protocols
- Knowledge of industry regulatory rules, relevant legislation and requirements and keeping up with systems and regulatory changes
- Proactive, confident and professional approach to problem-solving, at times with minimal supervision
- Excellent analytical thinking, problem-solving and conflict management skills
- Detail oriented with advanced knowledge of administrative functions and procedures
- Excellent oral and written communication skills
- Acts as a positive team-player – trustworthy, capable, and reliable.

**QUALIFICATIONS**

- Post-secondary education in Business Administration, Finance or equivalent experience
- Strong oral and written English and French communication skills
- At least 5 years of Sales Administration experience a must
- 2+ years of experience within a sales and/or brokerage industry environment is a strong asset
- Advanced skills in Microsoft Office (Excel, PowerPoint and Word)

Highgate is committed to fostering an inclusive, accessible environment where all employees and customers feel valued, respected and supported. If you are invited to interview and require accommodation (including alternate formats of materials, or accessible meeting rooms or other accommodation), please let us know and we will work with you to meet your needs

**Application Instructions:**

To apply, please visit: <https://www.linkedin.com/jobs/view/3111907504>

We thank all applicants for their response but only those considered for an interview will be contacted.