ECHELON
WEALTH PARTNERS

JOB TITLE: Investment Advisor Assistant

LOCATION: Downtown Toronto

STATUS: Full-time, Regular

REPORTING TO: Manager, National Branch Administration

COMPANY OVERVIEW

Echelon Wealth Partners is a leading independent, Canadian-owned, and operated wealth management and capital markets firm, known for our client-centered approach and entrepreneurial spirit. Echelon is a compelling option for investors seeking unbiased investment solutions, professional management, and unparalleled service. We aim to build lifetime relationships and deliver superior service. We are also a growing firm, with more than $8 billion in assets under administration and management. We service clients across Canada from our offices in Toronto, Oakville, Ottawa, Montreal, Calgary, Vancouver, Victoria, Saskatoon, and London.

POSITION OVERVIEW

Echelon Wealth Partners is currently looking for a licensed Investment Advisor Assistant to join our Wealth Management team in downtown Toronto. This role will support a team of Investment Advisors/Portfolio Managers in establishing and maintaining 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 branch by maintaining a working knowledge of the business environment, keeping the investment advisor informed, responding to business needs and providing practical solutions
- Review, administer and follow-up on all Compliance related queries
- Review, administer and follow-up on credits and debits
- Provide excellent client service to all inquiries, including quotes and client account related inquiries
- Maintain files on an ongoing basis (Account opening forms, KYC updates, Compliance queries and Reports)
- Help build marketing material

- Implement and administer a CRM and gather pertinent client data to build maintain the database

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 (Investment Advisor(s) and Portfolio Manager(s))
- 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 communication skills
- At least 3 years of Sales Administration experience a must
- 2+ years of experience within a sales and/or brokerage industry environment is a strong asset
- Canadian Securities Course (current) a must
- Conduct & Practices Handbook (current) a must
- Advanced skills in Microsoft Office (Excel, PowerPoint and Word)

Echelon 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/2994838486