



Sales Assistant **Calgary, AB**

Leede Jones Gable is one of Canada's leading independent investment dealers providing a full range of investment products and services to clients all across Canada. Our diverse group of experienced and knowledgeable investment advisors and portfolio managers offer timely, objective financial advice helping clients achieve their long-term financial goals.

Leede Jones Gable is currently looking for an energetic, detailed, and organized individual to join our Calgary team. This role will support advisors in providing professional, efficient customer service and excellent administrative management of client accounts, in accordance with the firm's procedures and regulatory standards in the securities industry.

Key Responsibilities

- Assume various operational support duties related to the advisor, including completing transactions on behalf of clients following instructions from investment advisors;
- Support the investment advisor in all administrative, customer service, and business development activities;
- Ensure the investment advisor is organized for each day;
- Respond to requests for information from clients regarding their account and/or the firm's products and services;
- Complete, check, and forward various forms related to account openings;
- Monitor daily activity in client accounts and handle various administrative details to free up the advisor;
- Check data from various information sources to ensure their compliance, in accordance with established policies and standards (transaction corrections, cheque requisitions, and deposits, transfer follow-ups, mail received and sent, etc.);
- Carry out, buy and sell transactions for clients under instructions from the advisor;
- Carry out data entry, including producing various documents for clients, while ensuring the quality of the writing and the presentation of documents and;
- Help the team identify operational risks and improvement opportunities related to its activities.

Qualifications

- A minimum of one year of relevant experience;
- Successful completion of the Canadian Securities Course and the Conduct and Practices Handbook Course;
- Administrative experience in a financial/brokerage environment;
- Exceptional communication skills;
- Ability to prioritize and multi-task;
- Demonstrate ownership and execution of primary responsibilities;
- Ability to work under pressure, meeting strict deadlines;

- Proficient with Microsoft and Excel;
- Proficient in Dataphile is considered an asset.

Salary and benefits will be competitive with industry standards and subject to candidate qualifications. Candidates wishing to be considered for this employment opportunity should submit a resume and cover letter.

We strive to foster a workplace that reflects the diversity of people and the clients we serve, and we are committed to excellence and inclusion in our organization. We welcome applications from all qualified candidates. We thank all those who apply; however, only those selected for an interview will be contacted.

Please respond with your resume to: humanresources@leedejonesgable.com