



**JOB TITLE:** Coordinator, Operations Support

**INDUSTRY:** Financial Services

**LOCATION:** Toronto

**REPORTING TO:** Director, Operations

**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**

This position is an opportunity for the incumbent to gain an overview knowledge of an Operations department. As Associate, Operations Support, you will be responsible for supporting the Operations team in various areas such as contract processing, reconciliation of broker accounts and F/X, account opening and account transfers. Some of your main duties will include reconciling foreign exchange accounts, monthly broker account reconciliation and within the contracts desk, processing trade blotters, analyzing and working with the teams to correct failed trades. Success in this role will require you to be somebody who has some experience in the Operations department of a Brokerage and willing to learn a variety of roles. As well, the incumbent will be someone who works well with numbers, has good attention to detail, is organized, articulate and an excellent team player.

**Core Responsibilities:**

**Contracts**

- Provide support to the Contracts Associate through:
  - Entering trades into Dataphile manually or loading blotters
  - Cancelling / amending trades in Dataphile as required
  - Analyzing and correcting failed trades
  - Work in close communication with Financial Advisors / Assistants and the Trade Desk
  - Work with downstream vendor for trade settlements
  - Execute some Re-Org functionality such as warrant, stock option exercise

**Reconciliations**

- Conduct daily F/X reconciliations for foreign currency trades
- Reconcile Broker to Broker accounts for monthly reporting

**Overall Operations**

- This role requires incumbent to work and gain experience in other areas as required, areas such as:
  - Fee processing
  - Relieve reception on occasion

**Key Attributes:**

- Self-starter and team player
- Able to work in fast paced environment
- Good working knowledge of Microsoft Word and Excel
- Excellent written and oral communication skills
- Must possess tact, good judgement, and analytical skills
- Strong organizational skills --must be able to handle high volumes during peak periods
- Sound judgment – makes sound decisions and can exercise discretion
- Proactive and solution-orientated, able to use initiative and work independently
- Consistently demonstrate Echelon's Values and Pillars and acts as a positive team-player

**Qualifications:**

- 2 to 3 years of experience working in the brokerage field with specific exposure to contracts processing / trade settlements
- 2-year college diploma in business administration, or a related discipline.
- Familiarity with IIROC rules an asset
- Knowledge of Dataphile Account Profile systems required

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 click "Apply for this job". We thank all applicants for their response but only those considered for an interview will be contacted.