Managed Products Administrator

Wellington-Altus Private Wealth

Role:	Managed Products Administrator
Role Description:	The Managed Products Administrator will play an integral role in the administration of our managed products service offering. The successful candidate will work closely with the documentation department on the set up of all new accounts.
Responsibilities & Activities:	➢ Be highly efficient using Office 365 and Windows 10, specifically Microsoft Excel. ➢ Become an expert resource person on all policies and procedures concerning managed products and fee-based accounts. ➢ Responsible for set up and coding of all fee based accounts. ➢ Responsible for daily and monthly reconciliation to ensure proper coding and billing of accounts. ➢ May involve troubleshooting, analyzing numbers and interpreting data. ➢ Act as the intermediary for all questions, concerns from staff who are opening the fee based accounts and the back office who is processing the accounts. ➢ Act as a general resource person for branch staff. ➢ Performs other duties as assigned.
Educational & Industry Requirements:	➢ Diploma in business administration, finance, or similar field of study considered an asset, but not required. ➢ Industry experience is considered an asset, but not required.
Knowledge, Skills, & Abilities:	➢ Must have strong analytical skills ➢ Excellent communication skills. ➢ Reliable, consistent work ethic. ➢ Ability to quickly adapt to changing needs. ➢ Excellent attitude and committed to providing extraordinary service. ➢ Salary is commensurate with experience.