

ScotiaMcLeod Branch Administrator

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Date: Jul 22, 2019

Location: Kelowna, BC, CA

Company: Scotiabank

Requisition ID: 66943

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Purpose of Job: In partnership with the Branch Manager, the Branch Administrator is responsible for contributing to the overall success of the branch by ensuring a high level of client service achieved by effective operations and administrative efficiencies. Additionally, the BA provides administrative support to the producing Branch Manager or another Advisor Team.

Major Accountabilities:

1. Manage all branch support staff by:

- Providing on-going coaching and employee development, performance management, guidance, motivation and support
- Resolving employee issues and working with Employee Relations as required
- Providing ongoing employee recognition by recognizing and rewarding success
- Resolving issues/negotiating compromises between staff and Advisor or other team members
- Finalizing annual objectives and employee development plans
- Planning and facilitating support staff meetings
- Building a culture of high performance and continuous improvement
- Interviewing and selection of candidates
- Coordinating the set-up, on-boarding and training of new support staff
- Maintaining all HR administration and employee records
- Working with staff to escalate issue with back office

2. Manage the quality and efficiency of branch operations by:

- Ensuring the cage operations run smoothly
- Working to resolve any system issues that have been escalated by Branch Systems Administrator
- Working with the BM on the departure of an Advisor
- Co-ordinating the set up and on-boarding of new Advisors
- Liaising with Head Office/Regional Office regarding new initiatives
- Administer the branch (house) client accounts

3. Management of New Issues by:

- Distributing branch allocations to Advisors
- Monitoring the Branch new issue/BOT position

4. Manage and implement procedures to ensure compliance with corporate policies and industry regulatory bodies by:

- Ensuring branch adherence to privacy and anti-money laundering requirements
- Maintaining all branch compliance files
- Approving trade corrections

- Effectively communicating policies, procedures, new systems, new initiatives and organizational changes

- Acting as the branch contact for internal audit
- Monitoring the Continuing Education requirements for all licensed staff

5. Supporting Branch Manager with Branch expense management by:

- Conducting Financial Information System (FIS) queries on various expenses
- Managing all branch expenses (eg. Supplies, etc)
- Reviewing monthly branch reports (Staffing Spreadsheets, FIS, T-One, Dashboard...)

6. In partnership with the Branch Manager, provide strong team leadership to motivate and develop individual and team performance by:

- Fostering and developing a strong, positive team environment, driving employee empowerment, innovation and a high degree of engagement
 - Exhibiting an ability to listen, negotiate and communicate goals
 - Sharing knowledge, experience and responsibility with employees in a drive for the highest standards of professionalism and service excellence
 - Ensuring the performance management process is in place and employee development is a priority for all employees on the team
- Assisting in optimum functioning of the team
- Providing advice and support on HR related issues
- Regularly scheduling one-on-one coaching with direct reports
- Identifying and supporting training and developmental needs of team members
- Managing staffing requirements and departmental workloads
- Participate in all monthly calls (BM Call, BA Call, National Support Call)

7. Administrative support for producing Branch Manager (or another Advisor team in branch)

Education:

- Excellent written and verbal communication skills
- Strong management skills
- Strong interpersonal skills when interacting with both staff and external clients
- Knowledge of Microsoft systems: Word, Excel and PowerPoint
- Previous industry experience • Post Secondary Education
- Minimum 5 years in the Investment Industry
- IR Licensing (completion of CSC, CPH and IRT)
- Previous experience in a Support Staff position preferred
- Some supervisory experience

Dimensions:

- High level of complexity of people management and operational needs of top advisor teams
- High level of authority on branch issues, staffing and client issues
- Signing authority
- Dual role of associate and branch administrator
- Approve 3rd party cheques

Working Conditions:

- The role operates within a standard office environment, generally with less than 15 advisory teams
- The branch is a fast paced often high stress environment often with conflicting demands.

Location(s): Canada : British Columbia : Kelowna

ScotiaMcLeod and Scotiabank are committed to providing an inclusive and accessible candidate experience. Only those candidates selected for an interview will be contacted. If you require accommodation during the recruitment and selection process, please let us know. We will work with you to meet your needs.

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