



Team Lead, Mutual Funds – Vancouver

This year, Odlum Brown celebrates its 99th anniversary as an independent, employee-owned, full-service investment firm. We are honoured to be recognized as one of Canada's Best Managed Companies for 22 consecutive years and as one of Canada's Most Admired™ Corporate Cultures.

CULTURE AND VALUES

We are very proud of the vibrant culture that we have built and sustained for many years. It's the way we do things, how we make decisions and what defines which behaviours work and don't work – it's what makes up our DNA.

Our values are the cornerstone of our culture, a set of principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers and every other variety of person you can imagine. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. In 2020, Odlum Brown was the recipient of the Canada's Volunteer Award in the Business Leader category for British Columbia and the North. This national recognition by the Canadian government is the result of our team members' actions and continued support for various causes and organizations in our communities. We are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

We have an opportunity for a Team Lead, Mutual Funds to join our award-winning firm in the Vancouver office.

Reporting to the Supervisor, Mutual Funds, we are seeking an experienced subject-matter expert with strong knowledge of mutual fund products and client service processing. The ideal candidate is committed to client service excellence, detail-oriented and driven to provide exemplary support to advisory groups in a fast-paced environment. This role requires a critical thinker and skillful decision maker, who can quickly adapt in a continuously changing regulatory environment.

RESPONSIBILITIES

- Provide team members expert advice in mutual funds processes and best practices
- Ensure purchases, redemptions and internal transfers are processed on time



- Review mutual fund reconciliations and validate accuracy to ensure positions are aligned with fund companies
- Investigate discrepancies and make necessary adjustments
Serve as a priority contact for escalation of any urgent issues
- Support and deliver departmental training and establish and update training guides
- Deliver client service excellence by responding to inquiries accurately and timely
- Maintain and grow relationships with key contacts at mutual fund companies
- Play a leading role in projects and primary contact for internal and external stakeholders
- Assist in communication of department initiatives, changes and updates to team members
- Ensure standard operating procedures are followed and service level agreements are maintained
- Maintain up-to-date knowledge by participating in relevant meetings and seminars
- Identify opportunities to streamline processes for operational efficiencies and collaborate with team members to document new and existing processes
- Engage in ongoing learning and professional development to increase knowledge as a subject matter expert
- Participate in cross-functional department reporting, audit and review projects

KNOWLEDGE AND EXPERIENCE

- Minimum five years of investment industry experience in Mutual Funds or related capacity
- Must have experience with Broadridge Dataphile and Fundserv platforms
- Experience coaching, training and mentoring team members
- Expertise in advising a portfolio of internal clients and committed to delivering service excellence
- Self-starter and continuous learner with the capacity to work independently, along with flexibility and willingness to assist others
- Critical thinker and skillful decision maker, adaptable in a changing regulatory environment
- Excellent organizational skills, able to prioritize important and time-sensitive tasks
- Ability to work efficiently and accurately in a fast-paced dynamic environment with a sharp eye for detail
- Strong written and verbal communication and presentation skills
- Proficiency in MS Office (Word, Excel and Outlook)
- Completion of Canadian Securities Institute (CSI) or other investment-related courses considered an asset

Our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this job, we invite you to submit a cover letter and resume to hr@odlumbrown.com by **February 14, 2022**.

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

As part of fulfilling our responsibility to ensure a healthy and safe workplace, and in alignment with public health measures, Odlum Brown has a mandatory vaccination policy for all team members working on site at any Odlum Brown office. Our firm requires all team members to be fully vaccinated against COVID-19 to work on the premises.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.