Financial Administrator and Marketing Assistant

We are currently recruiting a full-time Financial Administrator and Marketing Assistant to support an established and successful Financial Advisor/Planner who specializes in the high net worth market.

This is an opportunity within the financial services industry to be an integral member of a growing team within a small firm.

This position comes with on-going training opportunities and exposure to many different aspects of the financial planning industry.

Your responsibilities will include:

- direct administrative support to a Wealth Management Advisor
- client meeting document preparation
- completion of post-meeting commitments, such as the execution of investment trades
- executing transactions as requested by clients
- responding to all client service enquiries, as well as those from client's other professional partners
- tracking information for Advisor's business plan
- working in a team environment to ensure best practices and balanced workflow
- assisting with the implementation of client events, communication, and marketing plans
- maintaining and updating website and social media

Your qualifications:

- post-secondary degree/diploma or an acceptable combination of education and progressively responsible work experience
- desire to pursue knowledge and growth – excited to pursue securities and insurance licenses
- ability to take the initiative, ownership of outcomes and a pro-active approach to work
- strong proficiency in Microsoft Windows
- strong oral and written communication skills
- exceptional planning, organizational and time management skills
- previous experience in handling confidential or sensitive information with integrity
- desire to grow and to expand capabilities and responsibilities
- understand and recognize priorities and deadlines with a sense of urgency
- completion of the Canadian Securities Course or the IFIC course considered an asset.

Permanent full-time position, 30 to 37.5 hours/week, working in our Stratford office, four/five days per week, 8:30 am – 4:30 pm.

Instructions for applying for this position:

Please provide your resume and cover letter that states why you would be a good fit for this position describing your three most defining attributes and the compensation range you wish to discuss.

Due date: 19 Oct 2020, 4 pm

To info@stratfordfinancialplanning.com

Job Type: Full-time

Experience:

- Administrative: 4 years (Required)
- Financial Services: 4 years (Required)

Licence:

- IFIC or CSC (Preferred)
- Life and A&S, (Beneficial)

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