

Front Office Coordinator/ Client Service Administrator

Alitis Investment Counsel is seeking a permanent full-time Front Office Coordinator/Client Service Administrator. This individual will possess strong communications skills, time management abilities and IT knowledge.

This key role, based in our Campbell River office, will be the first point of contact for clients and prospective clients, so being professional and polite are pivotal traits. You possess exceptional communication and relationship management skills and can professionally represent the Alitis brand.

Alitis Investment Counsel provides endowment style portfolio management, coupled with comprehensive wealth planning services. Our team of professionals operate with an entrepreneurial spirit that is client focused and team based. Client testimonials and excellent client retention rates demonstrate that our relationships are enduring and a hallmark of the Alitis brand.

The responsibilities of this role include:

Front Office

- Greet clients and other visitors
- Answer phones
- Book appointments
- Mailing
- Client service reporting
- Salesforce data entry
- IT support
- Ordering office supplies
- Miscellaneous adviser and executive team support, including trip planning, booking meeting rooms and assisting with job postings

Client Service Administrator

- Client documentation (Account opening, non-financial updates, pension transfers, estates, corporate accounts, etc.)
- Order processing and trade execution
- Record maintenance & Data reconciliation – CRM software, trading system (Dataphile), reporting system (Client Portal)
- Ongoing client communication
- General adviser support
- Communication with other professionals (Lawyers, pension companies, accountants)
- Helping to organize and attending occasional client events

The candidate will have/be:

- Excellent communication skills
- Experienced using Microsoft Word, Excel, and PowerPoint
- Exceptional at managing and prioritizing multiple tasks
- Strong client service skills
- Positive, collaborative, and conducts themselves with integrity in everything they do.
- Awareness of client privacy/confidentiality

Preference will be given to candidates with:

- Previous experience in the financial services industry
- Previous experience in reception or administration
- Experience with Salesforce or other CRM systems

This position is Monday to Friday from 8:30 to 5:00pm and includes a one-hour meal break.

Remuneration consists of a base salary, a team bonus, and a comprehensive group benefits program, which includes an employer-funded group RRSP.

In order to be considered for this opportunity, please submit a resume and cover letter outlining your relevant experience and salary expectations to careers@alitis.ca by March 5th, 2021.

COVID-19 Precautions:

Alitis is deeply committed to the health and safety of its employees, clients, and the community, and is currently operating under special provisions due to the COVID-19 pandemic. Interviews for this position may be conducted by video conference, in-person (respecting social distancing measures) or by phone.

The role is based in the office, however strict COVID-19 protocols are in place, including reduced office capacity, mandatory masks in common areas and frequent cleaning.

We thank all those who apply; however, only shortlisted candidates will be contacted.