

Client Service Administrator

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. We operate a fast-paced work environment, with our team members often filling a variety of roles driven by their interests.

We are seeking a permanent full-time Client Service Administrator. This individual will possess strong attention to detail, clear communication and be driven by a desire to help. Alitis Client service administrators provide essential support to our portfolio managers, and to our clients.

The responsibilities of this role include:

- Daily client communication by phone and email
- Providing flexible and timely support to a team of portfolio managers
- Processing 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)
- Communication with other professionals (Lawyers, pension companies, accountants)
- Helping to organize and attending occasional client events

The candidate will have/be:

- Excellent communication skills
- Strong client service skills
- Positive, collaborative, and conducts themselves with integrity in everything they do.
- Experienced using Microsoft Word, Excel, and Outlook
- Exceptional at managing and prioritizing multiple tasks
- Experience setting expectations with clients and colleagues
- 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
- Currently enrolled in industry related education such as CSC, CIM, CFP, CFA
- 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. This role will start in our Campbell River office for 6-12 months and then transition to our Comox office.

Remuneration consists of a competitive base salary, a team bonus, and a comprehensive group benefits program, which includes an employer-funded group RRSP. Alitis is a growing company, proud to offer plenty of opportunity for professional advancement to our team members.

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 December 3rd, 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.