

Client Service Administrator / Administrative Assistant

Get started in financial services with no industry experience required. Alitis Investment Counsel Inc. ("Alitis") is seeking a Client Service Administrator to join our growing team. This is an excellent opportunity to be part of a locally owned Investment Management Firm based on Vancouver Island.

Our new team member will have/be:

- Good attention to detail
- A friendly, helpful attitude
- Excellent communication skills
- Confident with Microsoft Office (Word and Excel) and learning new software programs
- Comfortable with simple math calculations involving percentages

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)

Preference will be given to candidates with:

- Previous experience in reception, administration, or client or customer service roles
- Experience with Salesforce or other Client Relationship Management systems

This is a permanent fulltime (40 hours) Monday – Friday, part-time may be considered. This role will start with training in our waterfront Campbell River office for 4-6 months, after training there will be an option to transition to our brand-new 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.

About US

Alitis Investment Counsel is an independently owned, Vancouver Island based portfolio manager. 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. Alitis is a growing company, proud to offer plenty of opportunity for professional advancement to our team members.

Alitis is an equal opportunity employer. We are committed to creating a diverse environment. All applicants will receive consideration for employment without regard to race, colour, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, or age.

To be considered for this opportunity, please submit a resume and cover letter outlining your relevant experience to careers@alitis.ca.

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