

Client Service Administrator

Full-Time | Permanent | In Office

Who We Are

Alitis is an Island-based, employee-owned discretionary portfolio management firm providing endowment-style portfolio management and comprehensive wealth planning services. Our team operates with an entrepreneurial, client-focused, and team-based spirit. Client testimonials and excellent retention rates reflect the enduring relationships that are a hallmark of the Alitis brand. With offices in Campbell River, Comox, and Victoria, we take a holistic approach to wealth management, supported by experienced Portfolio Managers, Financial Planners, and Insurance specialists.

The Opportunity

Alitis Investment Counsel is actively seeking a dedicated Client Service Administrator to join one of our Island-based offices in Campbell River, Comox, or Victoria. This permanent, full-time role (Monday to Friday, 8:30 AM to 5:00 PM, with a one-hour meal break) is pivotal in delivering exceptional client service, supporting our portfolio management team, and assisting with front desk responsibilities as needed.

As a Client Service Administrator, you will ensure seamless administrative support and unparalleled client experiences while occasionally supporting front desk duties, such as answering calls and greeting clients. Depending on the office location, you may be stationed at the front desk, serving as the first point of contact for clients and visitors.

Responsibilities

Client Service Administration:

- Daily client communication via phone and email.
- Provide flexible, timely support to portfolio managers.
- Process client documentation (account opening, non-financial updates, pension transfers, estates, corporate accounts, etc.).
- Handle order processing and trade execution.
- Maintain records and reconcile data using CRM software, trading system (Dataphile), and reporting system (Client Portal).

- Communicate with external professionals (lawyers, pension companies, accountants).
- Assist with organizing and attending occasional client events.

Front Desk Support:

- Answer phone calls and greet clients and visitors with professionalism.
- Book appointments and manage mailing tasks.
- Depending on the office location, serve as the front desk representative, acting as the first point of contact.
- Order office supplies and provide miscellaneous support to advisers and the office operation team.

Candidate Requirements

- Strong verbal and written communication skills.
- Confident with Microsoft Office (Word, Excel, PowerPoint) and comfortable learning new software.
- Exceptional attention to detail and ability to prioritize multiple tasks.
- Friendly, collaborative, and professional with a client-focused attitude.
- Awareness of client privacy and confidentiality.
- Comfortable with simple math calculations involving percentages.
- Positive and team-oriented.

Preferred Qualifications

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

Compensation and Benefits

Pay: \$52,000.00–\$62,000.00 annually

- Team bonus.
- Comprehensive group benefits program, including an employer-funded group RRSP.

How to Apply

Sound like a fit? Send your resume with **your name + Client Service Administrator** in the subject line to careers@alitis.ca

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.

We thank all candidates for their applications; however, only shortlisted candidates will be contacted.

Please note that we are unable to provide any sponsorship or support work visas of any kind at this time. Applicants must be able to work in Canada for any employer in a full-time, permanent capacity without sponsorship.