Job Description

ADMINISTRATIVE ASSISTANT

January 2022

POSITION OVERVIEW

Our team is looking for a professional, motivated individual to join our growing financial planning practice. The current position offering is that of administrative assistant to Nicky Trasias, CFP®. Please see below for a description of the role and its requirements.

ESSENTIAL WEALTH GROUP

510 Frederick Street, Unit 2
Kitchener, ON N2B 3R1
(519) 340-1382
info@essentialwealthgroup.com
www.essentialwealthgroup.com

SKILL REQUIREMENTS

- Exceptional client service; professional, friendly and courteous in all interactions;
- Proficient technical computer skills including use of Microsoft Office;
- Strong communication skills, both written and verbal;
- Cooperative and collaborative in a team environment;
- Able to work independently with little or no supervision in a fast-pace and continually changing environment;
- Excellent organizational and time management skills, including attention to detail, and ability to set priorities, meet deadlines and deal with competing priorities and work demands;
- Able to exercise good judgment, show initiative and be proactive;
- A general understanding of financial instruments and planning concepts;
- Committed to ongoing learning and training.

QUALIFICATIONS

- Preferred: Degree or Diploma in business/financial related fields or equivalent work experience in business administration.
- Preferred: Completion of the Canadian Securities Course (CSC) or willingness to enroll in the future.

SPECIFIC RESPONSIBILITIES

- Customer service duties; incoming and outgoing contact with clients and visitors;
- Professionally manage inquiries via telephone calls, e-mails and walk-ins;
- Meeting preparation and follow-up including; providing all necessary documentation, forms and statements to the advisor, posting financial trades and ensuring the correct and timely completion of any portfolio changes;
- Proactive preparation and processing of documents in accordance with appropriate policies for account openings, transfers, compliant updates, etc.;
- Act as liaison with mutual fund and insurance companies;
- Maintain up-to-date client information using the contact management system in place (Salesforce);
- Maintain and employ safe measures to ensure confidentiality of client information;
- Assist with the preparation of financial plans;
- Able to attend client events that may fall outside regular business hours.

In addition and more importantly to the above, at Essential Wealth Group, we all work as a team in maintaining exceptional customer service and optimal office conditions. This job description is designed to serve as an outline, however; all employees should be willing to step out of their regular role if there is a need for something to be taken care of with respect to maintaining client service and office conditions.

TO APPLY

To apply, please email your resume and cover letter to info@essentialwealthgroup.com.
Thank you!