

Position: Client Service Administrator

Date Posted: 08/18/2017

Our mission requires technically brilliant minds, creatively-charged souls, and a passion for making the financial industry a better place. Our environment is energetic and collaborative with competitive pay and benefits. Plus you get to work on making a real difference in people's lives.

We are looking for someone to join their team as a Client Service Administrator to assist with administrative tasks for our investments department.

Our clients are really smart and know that they need to plan well for their future, so they reach out to us to start investing. You will review their file and consolidate all the client's data to onboard. This process involves coordinating with our sales team to collect data, administrate client forms, and document all activities on our CRM (customer relationship management) system.

The most important characteristic of our support team is that we love helping clients reach their financial goals! We are trusted with sensitive data, and we believe it is our responsibility to ensure that our clients, and their information, are treated with respect and responded to efficiently.

Client Service Administrators have an eye for detail, know who and where to direct their communication, and love working in a team. While knowledge about different financial account types like RRSPs and TFSAs are helpful, we can always teach you ;)

General Job Description:

- Onboard clients: Consolidate all client data and administrate necessary client documents
- Managing follow up: Follow up with Clients & Portfolio Manager for signed paper work and initiate activities to continue on boarding process
- CRM Experience: Use a Customer Relationship Management system to keep track of work flow
- Financial Knowledge (not mandatory, but desired): Should be familiar with various financial account types (RRSP, RESP, TFSA, non-reg, etc.)
- Skills: Attention to detail, strong communication, rapport-building, interpersonal, customer service, team work
- Potential for leadership role

We Have:

- **Competitive salary and compensation structure, including options**
- **Beautiful, open-concept working environment conveniently situated in downtown Toronto**
- **Generous group benefits package**
- Company events
- Frequent office lunches
- A team of ballers to work with
- An open mind for new ideas

You Have:

- An amazing attention to the finer details of life
- Outstanding written and verbal communication skills
- An amiable and friendly disposition; people naturally trust you
- A great personality that works well with a team

You Might Also Have:

- Financial knowledge of account types (RRSP, RESP, TFSA, etc.)
- Customer Service experience
- Office Admin experience
- Customer Relationship Management (CRM) system experience

Please send a cover letter and resumé by Friday, August 25th, 2017 to careers@planswell.com with subject line "Client Service Administrator - {YOUR NAME}".