

Position: Office Assistant

About Planswell

Planswell uses patent-pending technology to create the most intelligent financial plans in the world, absolutely free. We enable people from all walks of life to align their investments, insurance and borrowing with their personal goals. To date, we have built over 90,000 financial plans for Canadians across the country and has raised over \$13.8 million in funding. Most recently, Planswell was named one of LinkedIn's Top Canadian Startups.

We are looking for an energetic and scrappy Office Assistant to join us on our mission and run our very busy Toronto HQ!

Although we value attitude over experience, our ideal candidate would have some experience working in an office environment and a proven track record of success.

What You'll Do:

- Serve as the first point of contact acting as the "face" of the company to clients, guests and vendors, ensuring a warm and positive first impression of our company
- Provide administrative support to team members through answering phones, making updates to the CRM, and maintaining client files
- Liaise between clients and internal stakeholders to increase efficiency of client onboarding
- Maintain various common areas including but not limited to the kitchen and conference rooms, keeping our office organized, spotless and safe
- Perform additional administrative duties as required
- Learn and grow constantly to feed your passion for self-improvement and making those around you better

Our Ideal Candidate Profile:

- A dedicated self-starter with a passion for helping Canadians achieve their financial goals
- Bachelor's Degree strongly preferred
- Minimum of 1 – 3 years' administrative experience in an office environment
- Proficiency in Salesforce is an asset
- Outstanding organizational skills; ability to accurately maintain and organize various schedules, projects and paperwork
- Good customer service skills in person as well as over the phone. Friendly, approachable and customer-oriented
- Innate problem-solving skills and impeccable attention to detail

Why Planswell:

- Opportunity to join our awesome mission and change the financial services industry for the better
- Competitive salary and compensation structure, including options
- Beautiful, open-concept working environment conveniently situated in downtown Toronto
- A team of 50+ smart collaborators and an open mind for new ideas



Please send a cover letter and resumé to careers@planswell.com with subject line “**Office Assistant - {YOUR NAME}**”.