Job Posting - Administrative Assistant

August 2022

Who we are

At Prairie Wealth Planning Consultants, you will find a boutique financial advisory firm based in Brandon, Manitoba. We engage with a select group of young professionals, farm families, business owners, elders and early retirees to provide consulting and financial planning services – and for many of those we serve, we become their Family CFO.

We are looking to hire an Administrative Assistant to assist with our office needs and those of our clientele.

Who you are

You enjoy providing both administrative assistance to a team and uncompromising service to clients. You are great at organizing and prioritizing work load, as well as ensuring client satisfaction by providing quick and efficient responses to their needs. Note that there will be room for growth within this role and/or within the firm. There is an option for less hours worked daily if more convenient to you depending on your situation. There is also an option for a hybrid model and even working remotely. The latter will require experience working in a financial services advisory firm.

As a successful candidate for this career, you will have:

- Experience in a financial services advisory firm (3+ years preferred)
- Insurance license - LLQP (an advantage)
- Post-Secondary education
- Excellent written and verbal communication skills
- Strong organizational skills and attention to detail
- Ability to take initiative, work independently and meet deadlines
- Ability to adapt to changes
- Understanding of industry and firm compliance regulations
- Advanced knowledge of technology, tools and software – including Microsoft Office Suite, CRM databases and investment trading-based platforms (preferred)

What you will be doing

- Building great rapport with clients, responding in a timely manner to their inquiries.
- Providing reception services such as greeting clients upon arrival and answering phones and e-mails
- Ensuring all client interaction is accurately documented in the CRM.
- Scheduling client appointments for the Advisor and following up with clients to confirm and to ensure they are prepared for their appointments.
- Supporting the Advisor in preparation for client reviews.
- Assisting the Advisor with the financial planning process by inputting client data in the software.
- Understanding the required documentation for all client account types and following up with clients on any missing documentation.
- Setting up and processing certain aspects of both investment and insurance accounts.
- Keeping client accounts up to date with address and bank changes etc.
- Resolving administrative issues expeditiously and accurately.

- Remaining up to date with all the regulatory rules and trading activities as it relates to client accounts.
- Maintaining client files and information on the appropriate systems.
- Coordinating and attending planning sessions for the team.
- Gathering research & product information from internal and external sources.
- Managing pick-ups and deliveries.
- Maintaining office support material.
- Maintaining the hardware and software needs of the team.
- Supporting other team members by pitching in where/when needed.

Salary
The offered full-time salary will be within the range of $45,000 to $55,000 depending on experience.

Next Step
Please respond with a cover letter expressing your interest in joining this team. Note that Kim Poulin of The Personal Coach is assisting us with making this hire.