Executive Assistant
Dauphin, Manitoba

THE OPPORTUNITIES

- To partner with an experienced and successful Wealth Management team.
- Opportunity to work within an established client base and be rewarded with shared equity.
- Have mentorship and access to support while growing your professional career.

RESPONSIBILITIES

Financial Planning Software

- Learn and become the practice expert in our new Financial Planning Software – Conquest
- Work with clients to information gather to have accurate information to populate client profiles within the software.
- Work with a lead consultant on building a first draft copy of the plan which can be reviewed with the consultant.

Administrative/Client Service Work

- Meeting follow up notes and documentation
- Facilitating client transactions
- Organize client events

Insurance

- Learn and become the practice expert in risk management.
- Be involved in client meetings to help with insurance needs analysis and discussion of solutions with a lead Consultant.
- Work directly with the Region Office Insurance Specialist.
- Assist behind the scenes with various insurance carriers to obtain quotes for clients.
- Once a strategy is agreed upon with a client, be responsible for overseeing and managing the insurance from the application stage through to placement.
- Conduct annual insurance reviews for clients.

Mortgages

- Learn and become the practice expert in debt management.
- Be involved in client meetings to help with mortgage needs and discussion of debt management issues with a lead Consultant.
- Work directly with the Region Office Mortgage Specialist.

IG Wealth Management

Sherrie Volk PFP, RRC

IG Wealth Management

Parkland office

217 Main St N

Dauphin, MB

R7N 1C1

- Assist behind the scenes with Solutions Banking and Investors Mortgage Department to obtain quotes for clients.
- Once a strategy is agreed upon with a client, be responsible for overseeing and managing the mortgage from the application stage through to placement.
- Conduct annual mortgage reviews for clients.

THE BENEFITS

- Competitive total compensation package, including potential equity share of the practice, bonuses, education support, etc.
- Entrepreneurial culture that promises personal growth and development in the high net worth market.
- Modern work environment and flexibility in your schedule that allows for hybrid work options

TO QUALIFY FOR THIS OPPORTUNITY, YOU SHOULD POSSESS

- 3 years of client relationship experience in the financial services industry
- Business Administration Diploma or other post-secondary degree
- Canadian Investment Funds Course (CIFC), Canadian Securities Course (CSC) or Mutual Fund Dealers Association (MFDA) licenced or equivalent or willing to obtain
- Life License Qualification Program (LLQP) or willing to obtain
- Strong personal skills and demonstrated ability to build relationships
- Customer service orientation with a demonstrated ability to interact professionally with clients both on the phone and face-to-face.
- Must be a team player

CONTACT US

Sherrie Volk

1-204-622-4551 (office)
Sherrie.volk@ig.ca