



Registered Accounts Administrator – Vancouver

FIRM OVERVIEW

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant culture that we have built and sustained for many years. These values are the cornerstone of our culture and the principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers and every other variety of person you can imagine. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. A recipient of a Canada's Volunteer Award from the Government of Canada, we are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

We have the opportunity for a Registered Accounts Administrator to join our award-winning firm in the Vancouver office.

Reporting to the Supervisor, Registered Accounts, we are seeking an experienced Registered Accounts Administrator with a strong knowledge of registered plans and products. The ideal candidate is client service-focused, detail-oriented and driven to provide exemplary support to advisory groups in a fast-paced environment.

RESPONSIBILITIES

- Record client information and process forms for account activity related to registered accounts (RRSP, RRIF, RESP, RDSP and TFSA)
- Process registered accounts tax reporting
- Respond to day-to-day inquiries and requests from internal and external clients in a timely manner
- Participate in training new and existing colleagues and assistants on registered accounts
- Contribute to and lead continuous improvement initiatives related to best practices, operational efficiency and service levels



- Work closely and collaboratively with team members across the firm

KNOWLEDGE AND EXPERIENCE

- Experience in the investment industry is an asset and registered accounts knowledge preferred
- Experience in a financial institution with a solid understanding of CRA rules and trustee obligations for registered products
- Working knowledge of financial regulatory requirements on registered products, tax reporting, anti-money laundering and compliance
- Ability to exercise good judgement and decision-making within a policy and regulatory framework
- Strong client services skills, with a keen eye for detail and the ability to work efficiently and accurately
- Proven organizational skills, with the ability to prioritize important and time-sensitive tasks
- Self-starter with the capacity to work independently, along with flexibility and willingness to assist others
- Ability to take initiative and seek out information and solutions independently
- Excellent verbal and written communication skills
- Experience with Broadridge's Dataphile or similar bookkeeping system
- Intermediate proficiency in MS Office (Word, Excel, Outlook)
- Completion of the Canadian Securities Course or other investment-related courses is an asset

At 100 years young, our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this role, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **May 26, 2023**.

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.