



Document Management Administrator - Vancouver

WHO WE ARE

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for over 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, ever-evolving culture that we have built over the 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 – all with diverse backgrounds and experiences to share from around the globe. 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 an opportunity for a Document Management Administrator to join our award-winning firm in the Vancouver office.

WHAT YOU'LL DO

This role reports to the Supervisor, New Accounts and Document Management and works closely with our Investment Advisors, Assistants and other Client Services departments. You will work in a collaborative environment to ensure important client documents are archived electronically and original documents retained and stored off-site.

RESPONSIBILITIES

- Manage and apply changes to the Doxim electronic archiving platform
- Verify data for accuracy prior to uploading client documents into Doxim
- Reset and create temporary passwords to allow client access to account activity and statements
- Update client accounts when mail has been returned
- Create welcome letters for new clients and mail client account applications to new clients



- Sort and distribute monthly estate-related client statements

KNOWLEDGE AND EXPERIENCE

- Minimum of one year of experience in client services or administrative capacity
- Post secondary diploma is an asset
- Exceptional attention to detail and skilled at working efficiently and accurately
- Strong organizational skills with ability to prioritize important and time-sensitive tasks
- Self-starter with the capacity to work independently, along with flexibility and willingness to assist others
- Strong interpersonal and relationship-building skills with the ability to work within a team environment
- Excellent verbal and written communication skills
- Intermediate proficiency in MS Office (Word, Excel and Outlook)

WHAT WE OFFER

A culture of openness, collaboration and respect is foundational to our firm. We are a diverse, driven group of individuals who genuinely care about one another and encourage and appreciate each other's contributions. We believe in rewarding team members and do this by providing a competitive total rewards package that is fair and equitable; mentorship programs; flexible work options; and a variety of professional development opportunities to expand your career. This role has an expected salary of \$44,000 - \$47,000/year, plus the potential for bonuses.

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 **August 7, 2024**.

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.