



## Investment Assistant – Kelowna

### 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 three Investment Assistants to join our award-winning firm in the Kelowna office.**

### WHAT YOU'LL DO

You will provide administrative support to Investment Advisors. The ideal candidate has a strong client service orientation and takes pride in their work. They have a proven history of building relationships with clients and are proactive and engaged.

### RESPONSIBILITIES

- Coordinate client account documentation and follow through to account opening



- Execute mutual fund, equity and fixed income trades
- Initiate and track account transfers
- Provide daily, weekly and monthly reporting
- Prepare materials and coordinate logistics for client meetings
- Assist with client outreach including email, correspondence and telephone communication
- Various aspects of general administration

#### **KNOWLEDGE AND EXPERIENCE**

- Minimum of 2 to 3 years of administrative experience within the banking, securities and/or brokerage industry
- Undergraduate degree in Business, Finance or Engineering
- Completion of the Canadian Securities Course and the Conduct and Practices Handbook Course to meet the qualifications necessary to be approved as an Investment Representative
- Exceptional verbal and written communication skills
- Articulate, tactful and confident interacting with clients
- Exceptional attention to detail and skilled at working efficiently and accurately
- A team player with a proven track record of building trusting and productive relationships with colleagues and clients alike
- Strong analytical and organizational skills, with the ability to manage multiple priorities
- Disciplined, driven and operates with a high level of accountability
- Intermediate knowledge of MS 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 starting salary and commission range of \$53,000 – \$60,000/year, plus the potential for bonuses.

Our team is growing, and we've got room for three 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](mailto:careers@odlumbrown.com) by **August 9, 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.