



INVESTMENT ADVISOR ASSISTANT

About the position

Haywood is currently recruiting an **Investment Advisor Assistant** to join its Vancouver Office. To be successful in this role, the candidate must be able to demonstrate a commitment to providing exceptional client service, attention to detail and a willingness to take on new responsibilities and challenges as they arise.

Responsibilities include:

- Greeting clients and handling client calls
- Scheduling meetings and keeping calendar up to date
- Preparing and processing new account documentation
- Manage daily client inquiries and transactions
- Execution of trade orders
- Prepare New Issues & Private Placement documentation
- Investment research
- Handling all client paperwork and liaising with various departments as needed
- Other administrative duties as required

Requirements:

- Excellent written and verbal communication skills
- Proficient in Microsoft Office Suite – Excel and Outlook
- Fluent in Mandarin and Cantonese
- Office related experience
- Proficient in data entry with excellent attention to detail
- Ability to work with minimal supervision
- Must be able to multi-task and manage multiple deadlines
- Pro-active with a team-first attitude
- Willingness to take Investment courses as requested by the Sales Team
- Must be flexible with work schedule, hours may be varied
- Licensed as a Registered Representative-Retail is an asset
- Dataphile knowledge an asset

- Experience in financial industry an asset
- CSC completion an asset

Job Details

Status: Permanent full-time

Location: Vancouver

Compensation: \$43,800.00 - \$52,800.00 plus the potential to earn variable commission

Schedule: A start time of 6:00 am PST, in office, Monday to Friday

NOC Code: 14201 – Securities Clerk, Financial Sector

Please note to be considered for employment at Haywood, candidates will need to provide proof of eligibility to work in Canada. We would like to thank all candidates for their interest in this position, however only qualified candidates will be contacted. No phone calls will be accepted.