Account Transfers 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 an Account Transfers Administrator to join our award-winning firm in the Vancouver office.

WHAT YOU'LL DO
Reporting to the Supervisor, Account Transfers, you will work in a collaborative environment within the Account Transfers team. You will be responsible for processing incoming and outgoing transfer requests and liaising with Investment Advisors, Assistants and other departments within our Client Services operations.

RESPONSIBILITIES
- Process incoming and outgoing transfer requests with speed and accuracy
- Verify and ensure transfer documents are in good order with advisor teams
- Monitor and troubleshoot transfers of accounts in a timely manner
- Liaise with advisor teams
- Cross train in other functions within the department as needed

COMPETENCIES

- *Analysis* – Able to analyze both qualitative and quantitative data to identify key themes, insights or issues or support decision making, critically evaluate information, separating relevant details from noise, provide input into decisions by interpreting information in context
- *Coordination* – Able to independently prioritize, organize, and manage routine tasks, resources, or activities to meet goals, ensure timely communication and alignment among stakeholders to maintain progress, adapt plans and schedules to address common changes or constraints effectively
- *Customer* Service – Able to independently determine customer needs and provide solutions for common inquiries or requests, apply internal policies and regulations effectively to fulfill transactions and resolve routine issues, prioritize and escalate customer requests appropriately to ensure timely resolution
- *Operational Policy and Procedures* – Able to apply standard policies and procedures independently, identify and address minor inefficiencies in processes, ensure compliance with established guidelines in daily work
- *Project Management* – Able to assist with basic project tasks under guidance, track project milestones and update stakeholders on progress, demonstrate awareness of key project management principles
- *Regulatory Knowledge* – Able to independently ensure compliance with standard laws and regulations in daily work, provide guidance to others on basic compliance issues, stay informed about updates to relevant regulatory requirements
- *Systems and Application Proficiency* – Able to independently navigate and use systems and applications to improve productivity, troubleshoot and resolve minor issues with systems and applications, train others in standard system and application use and functionality

KNOWLEDGE AND EXPERIENCE

- 1–2 years Transfers experience within an investment firm is an asset
- Familiarity with investment accounts (RRSPs and TFSAs) is an asset
- Strong client services skills, with a keen eye for detail and the ability to work efficiently and accurately
- Strong 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
- Ability to exercise sound judgment to resolve challenging scenarios
- Excellent verbal and written communication skills
- Experience with Broadridge Dataphile and ATON system is an asset
- Intermediate proficiency in Microsoft 365

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 $46,000 – $50,000/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 **March 31, 2025.**

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.