Investment Assistant – Victoria

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 Investment Assistant to join our award-winning firm in the Victoria office.

WHAT YOU'LL DO
You will provide administrative support to two Portfolio Managers to provide wealth management services to some of the most successful families in Canada and worldwide. The ideal candidate has a strong client service orientation, takes pride in their work, and brings a personable, positive energy to the role. You have a proven history of building relationships with clients, are proactive, engaged, and focused on continuous learning. We are looking for a long-term individual who values a family-friendly work environment.

RESPONSIBILITIES
- **Administration and Analysis**
    - Coordinate client account documentation and follow up on account openings
    - Handle cash management, including initiate and track incoming and outgoing account transfers, purchases, and redemptions of cash equivalents
    - Analyze and manage trading recommendations, utilizing spreadsheets and portfolio management tools to support strategic asset mix decisions for clients

  - Conduct research on market intelligence to provide valuable insights
  - Prepare packages and liaise with tax professionals and clients during tax season
  - Provide administrative support, including calendar and email management and correspondence
  - Provide daily, weekly and monthly reporting
- **Client Support and Relationship Building**
  - Assist with client outreach including email correspondence and telephone communication
  - Prepare materials and coordinate details for client meetings
  - Foster and support relationships by liaising with clients, responding to requests, and proactive problem-solving
  - Build a strong working relationship with the Portfolio Managers to provide proactive support
- **Prospecting and Marketing**
  - Assist with internal and external communication, including email campaigns and promoting events and seminars
  - Assist with marketing initiatives and manage business social media accounts such as LinkedIn and Portfolio Manager's website content
  - Track and follow up on opportunities to support business growth
  - Utilize successful strategies provided by the Portfolio Managers to schedule appointments

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 and provide input into decisions by interpreting information in context
- *Coordination* – Able to coordinate complex activities, aligning people, resources, and timelines to achieve goals efficiently, manage competing priorities, ensuring clarity, accountability, and timely completion of tasks and proactively identify and resolve barriers that impact coordination or goal achievement
- *Customer Service* – Able to manage diverse and complex customer needs, ensuring accurate, timely, and policy-compliant resolutions, identify underlying customer concerns and recommend proactive solutions or improvements and balance multiple customer priorities, maintaining high levels of satisfaction and efficiency
- *Digital Literacy* – Able to adapt and apply advanced digital tools and systems to improve efficiency and effectiveness, integrate and analyze information from diverse digital sources for decision-making and model safe and responsible digital practices in day-to-day work
- *Investment and Portfolio Management* – Able to assist with basic investment tasks, research and support, support the proactive and effective management of client accounts and communication with clients and demonstrate awareness of fundamental investment principles and risk factors.
- *Product Knowledge* – Able to independently maintain in-depth knowledge of key products, applications or services, address client or customer inquiries effectively with relevant details about products, services, tools or applications and identify potential product or service improvements.
- *Regulatory Knowledge* – Able to independently ensure compliance with standard laws and regulations in daily work, provide guidance to others on basic compliance issues and stay informed about updates to relevant regulatory requirements

KNOWLEDGE AND EXPERIENCE

- 2 to 3 years of administrative experience within the financial services industry, securities and/or brokerage industry is an asset

- 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
- Intermediate knowledge of Microsoft 365, with strong knowledge of Excel
- Knowledge of Broadridge's Dataphile and/or Salesforce is an asset
- Exceptional verbal and written communication skills
- Articulate, tactful and confident interacting with clients
- Exceptional attention to detail and skilled at working efficiently and accurately
- Team player with a proven track record of building trusting and productive relationships
- Strong analytical and organizational skills, with the ability to manage multiple priorities
- Disciplined, driven and operates with a high level of accountability

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 and commission range of $50,000 – $65,000/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 **April 15, 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.