Job Posting - Senior Administrative Assistant
June 2021

Who we are

Personal Financial Solutions is led by Michael Moreau, CFP, RFP. We help individuals who are serious about their financial situation and want help attaining financial peace of mind. We have been helping clients make informed financial decisions for over 30 years. We are expanding our team now by adding a **Senior Administrative Assistant**.

We have a friendly working atmosphere and a great office location which is on major bus routes and walking distance to the LRT. There are also several, affordable restaurants nearby.

Who you are

You are ready for a mid-level, non-sales position that provides support to the advisor, other employees, and clientele by handling a variety of tasks in order to ensure that all interactions between the organization and others are positive and productive.

If you enjoy varied and interesting work in the financial field and you like to help people, then this role could be for you. Please note that there is an opportunity for professional growth.

What you will be doing

1. Build great rapport with clients and be responsive to their needs, including answering their questions, updating their information and booking appointments.

2. Meet regularly with the advisor to review outstanding activity and requirements for upcoming appointments.

3. Handle all follow-up post client meetings such as entering and updating data into our client tracking systems and keeping clients informed of where they are at in the process.

4. Process investment accounts from signing to successful integration into the client's portfolio.

5. General administration and support including reviewing paperwork for accuracy; ordering supplies; investigating and solving administrative issues quickly, accurately, and completely; and owning client concerns until a resolution is achieved.

6. Prepare and submit tax returns for clients which includes interview or gather data from clients to acquire information about taxable income, previous tax returns, deductible expenses, or any allowances incurred; analyze tax data submitted by the client to maximize the outcome for the client and handle communication from clients and tax authorities – note that this is a future growth area.

7. Provide financial planning services such as gather and input client data into retirement planning software; and prepare potential solutions – note that this is a future growth area.

8. Reception duties which include greet clients upon arrival, offer beverage of choice, answer phones/e-mails and collect and distribute mail.

Education/Skills/Requirements

- Experience in a financial services advisory firm and/or financial planning knowledge is an asset
- Ability to become licensed for mutual funds and/or obtain CFP designation
- Post-Secondary Education
- Client service and relationship development skills
- Excellent, effective communications skills – verbal and written
- Ability to multi-task, make sound decisions quickly and take initiative
- Advanced knowledge of technology, tools and software – including Microsoft Office Suite
- Tax preparation experience is an asset

Company name:	**Personal Financial Solutions**
Current Websites:	www.personalfinancialsolutions.ca
Category:	Full-Time position and advancement opportunities Monday to Friday 8:30 to 5pm
Salary Range:	$22 - $25 per hour ($44,000 - $50,000)

We appreciate your interest in Personal Financial Solutions and acknowledge receipt of your resume. In the event that we wish to arrange an interview, we will contact you through Indeed. Please note that Kim Poulin of The Personal Coach will be assisting us with making this hire. Again, thank you for your interest.