Job Posting

Position Title	Manager, Client & Advisor Service
Performance Coach	Director of Operations
Department	Value Partners Investment Counsel
Last Revision Date	June 2022

Position Summary

Reporting to the Director of Operations, The Manager of Client and Advisor Service is responsible for ensuring the overall efficiency and effectiveness of the VPIC Client Service Delivery model, which includes new client onboarding, client and advisor service, and training. The incumbent attends client meetings with Portfolio and Relationship Managers and is ultimately responsible for ensuring a seamless, high quality 'White Glove' experience for the advisors, clients, and families VPIC serves.

The Manager of Client and Advisor Service provides supervision, training, and coaching to the Client Service Associate, develops and maintains training, process, and procedural documentation, and conducts workflow and procedural audits as required. The incumbent also collaborates with the Manager of Portfolio Administration to regularly monitor and review the VPIC book of business and provides updates on progress and client service initiatives to senior leaders and the wider VPIC Team.

Responsibilities

- **New Client Onboarding** **(25%)**
  - Oversee the client onboarding process ensuring accuracy and efficiency while offering a seamless, high quality, 'White Glove' client experience
  - Attend new client onboarding meetings with Portfolio and Relationship Managers to ensure a smooth onboarding experience, and to establish the role and value the Client Service Team provides to clients on an ongoing basis
  - Liaise with Portfolio Managers and Advisors to troubleshoot and provide updates on onboarding and client-related matters
  - Closely monitor Transfers and provide status updates to the VPIC Team
  - Become a Mako Power User with the ability to provide demos to internal and external stakeholders as may be required

- **Client and Advisor Service & Relationship Development** **(25%)**
  - Work with Manager, Portfolio Administration to regularly monitor and review the VPIC book of business (manage the 'referral book') to ensure accounts are in good order and the effective delivery of the client service model
  - Conduct Referral Advisor and Assistant training regarding client portal system, statements, VPIC processes, etc.

  - Resolve escalated service issues and provide solutions for clients pertaining to high value/complex account openings, management of estate settlement process according to VPIC policy, procedures, and compliance guidelines
  - Communicate with internal and external stakeholders in a sensitive and caring manner
  - Develop and maintain relationships, attend industry and external events including but not limited to VPI Annual General Meeting and Speaker Series events

- **Provide supervision, training, and coaching to Client Service Associate (20%)**
  - Responsible for ensuring CSA is fully and completely trained on all aspects of client onboarding and client service processes and procedures
  - Develop and maintain training, process, and procedural documentation
  - Provide oversight to ensure efficient and effective client service delivery, conduct audits, and provide ongoing feedback to CSA as required
  - Provide coverage when Client Service Associate is out of office

- **Develop and maintain the VPIC Client Service Delivery Model (20%)**
  - Consistency review, monitor and manage the Client Service Delivery Model to ensure client service efficiency and effectiveness across VPIC
  - Provide status updates and report on progress, key metrics, and indicators to senior leaders and wider VPIC Team during weekly meetings
  - Work closely and collaboratively with Portfolio Managers, the Manager of Portfolio Administration, Operations, and Compliance Teams to consistency improve the model
  - Provide recommendations for, and updates regarding, continuous improvement to VPIC leaders

- **Special Projects, Events, and Gifts (5%)**
  - Own VPIC Client and Advisor projects and events as may be required
  - Proprietary advisor service (TBD)

- **Other duties as assigned (5%)**

Qualifications

Education & Experience

- Undergraduate degree in Commerce, Business Administration, Economics, or related discipline
- Willingness to expand on professional qualifications by completing the CSC or similar program / courses
- Five+ years of related experience in an investment or financial services environment, knowledge of the Canadian Securities industry is required
- Prior leadership, coaching, and/or training experience is required
- A combination of education and experience will be considered

Technical Knowledge

- Knowledge of investment management principles, best practices, and emerging trends
- Well-developed knowledge of VPI products and services
- Technical fluency with the ability to learn and adapt to new technology effectively
- Working knowledge of Salesforce, Portfolio Management software, and Advisor operating systems
- Advanced proficiency in Microsoft Office: Outlook, Excel, PowerPoint, Word, Teams

Skills & Abilities

- Ability to communicate clearly and concisely, verbally and in writing, to ensure effective interaction with key stakeholders (internal and external) to manage, inform and influence successful outcomes
- Strong client service orientation with the ability to build collaborative working relationships based on mutual trust to meet goals
- Advanced organizational skills, adept at managing and prioritizing multiple tasks with competing deadlines
- Proven analytical, problem solving and decision-making skills
- Detail oriented with a general penchant for excellence
- Ability to be flexible in one’s approach to established plans based on emerging needs
- Entrepreneurial spirit with a creative outlook and resourceful nature