Account Transfers Administrator – Vancouver

This year, Odlum Brown celebrates its 97th anniversary as an independent, employee-owned, full-service investment firm. We are honoured to be recognized as one of Canada's Best Managed Companies for 21 consecutive years and as one of Canada's Most Admired™ Corporate Cultures.

CULTURE AND VALUES
We are very proud of the vibrant culture that we have built and sustained for many years. It's the way we do things, how we make decisions and what defines which behaviours work and don't work – it's what makes up our DNA.

Our values are the cornerstone of our culture, a set of 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 and every other variety of person you can imagine. 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. 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.

This role reports to the Supervisor, Account Transfers. As an Account Transfers Administrator, 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

KNOWLEDGE AND EXPERIENCE

- 1-2 years of experience in a Transfers or Client Services department within an investment firm
- 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 the Broadridge Dataphile and ATON system is an asset
- Intermediate proficiency in MS Office (Word, Excel and Outlook)
- Completion of Canadian Securities Course or other investment related courses is an asset

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 job, we invite you to submit a cover letter and resume to hr@odlumbrown.com by **September 25, 2020**.

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.