



Financial Services Assistant – Vancouver

Odlum Brown Financial Services Limited is a wholly owned subsidiary of Odlum Brown Limited (Odlum Brown) that provides retirement and estate planning, tax planning and insurance products exclusively to Odlum Brown clients.

This year, Odlum Brown celebrates its 98th 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 22 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. In 2020, Odlum Brown was the recipient of the Canada's Volunteer Award in the Business Leader category for British Columbia and the North. This national recognition by the Canadian government is the result of our team members' actions and continued support for various causes and organizations in our communities. 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 a Financial Services Assistant to join our award-winning firm in the Vancouver office.

This role reports to the Vice President, Financial Services and works closely with our Financial Services team. As a Financial Services Assistant, you will work in a collaborative environment to prepare financial projections for clients using leading software. The ideal candidate is a diplomatic team player and critical thinker, with exceptional attention to detail, who provides exemplary client service.

RESPONSIBILITIES

- Work with financial modeling software (NaviPlan®) to prepare financial projections for clients of the firm
- Clarify and follow-up on outstanding information with Investment Advisors and clients
- Track and monitor financial projection requests



- Help interpret elements of financial projections to Investment Advisors
- Create customized and professional reports

KNOWLEDGE AND EXPERIENCE

- Minimum of two years of investment industry experience using financial planning software
- Experience with financial planning concepts, including personal income tax, retirement, pension and government benefits, as well as estate
- Familiarity with trust and private corporation concepts is an asset
- Experience with NaviPlan® or other financial modeling software is required
- Proficiency in MS Office (Word, Excel and Outlook)
- Self-starter and continuous learner, with the capacity to work within a team, along with the flexibility and willingness to assist others
- Ability to work efficiently and accurately, with a sharp eye for detail
- High aptitude to review assumptions and make recommendations on course of action
- Client service focused and committed to exceeding client expectations in a professional services environment
- Strong verbal and written communication and presentation skills
- Team player, with a proven track record of building trusting and productive relationships
- Completion of QAFP or CFP 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 **January 21, 2022**.

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.

As part of fulfilling our responsibility to ensure a healthy and safe workplace, and in alignment with public health measures, Odlum Brown has a mandatory vaccination policy for all team members working on site at any Odlum Brown office. Our firm requires all team members to be fully vaccinated against COVID-19 to work on the premise.

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.