



Investment Assistant – Chilliwack and Langley

This year, Odlum Brown celebrates its 99th 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 23 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 currently have an opportunity for an Investment Assistant to join our award-winning firm in our Chilliwack and Langley offices.

The successful candidate will work alongside other Assistants to support a group of Investment Advisors with their businesses.

RESPONSIBILITIES

- Various aspects of general administration
- Coordinating client account documentation and follow through to account opening
- Preparation and tracking of account transfers
- Assistance with client outreach including email, client correspondence and telephone communication
- Preparing daily, weekly and monthly reporting
- Execution of mutual fund, equity and fixed income trades
- Business development, preparing marketing materials



QUALIFICATIONS AND EDUCATIONAL REQUIREMENTS

- Intermediate knowledge of MS Word, Excel and Outlook
- Post-secondary education and previous administrative experience in the investment industry are assets
- 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

KNOWLEDGE AND EXPERIENCE

- Strong verbal and written communication skills
- Strong analytical and organizational skills, with the ability to manage multiple priorities
- Detail-oriented
- Client service focused – committed to exceeding client expectations
- Disciplined, with a strong drive and sense of accountability
- Self-starter, takes initiative
- Strong relationship building skills
- Team oriented – willingness to take on challenges and provide input to evolve the business

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 **July 8, 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.

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.