



## Investment Assistant – Victoria

This year, Odlum Brown celebrates its 96<sup>th</sup> 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 20 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.

**We currently have an opportunity for a registered Investment Assistant to join a team in our Victoria office.**

### AREAS OF RESPONSIBILITY

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

### QUALIFICATIONS AND EDUCATIONAL REQUIREMENTS

- Post-secondary education and previous administrative/assistant experience.
- Experience in the investment industry is an asset.
- Previous experience using Dataphile is an asset.
- Intermediate knowledge of MS Word, Excel and Outlook required.
- Completion of the Canadian Securities Course and the Conduct and Practices Handbook Course to meet the qualifications necessary to be approved as a Registered Representative.



## COMPETENCIES AND PERSONAL ATTRIBUTES

- 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.
- Discipline, drive and accountability.
- Relationship building skills.
- Team-oriented – willingness to take on challenges and provide input to assist in growing the business.

We are interested in candidates that are willing to make a long-term commitment to the team in this role.

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](mailto:hr@odlumbrown.com) by **March 25, 2019**.

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.