



## Investment Assistant – Vancouver (Job Requisition 1000-4)

### WHO WE ARE

Anchored in our purpose to help clients achieve their financial goals, Odium Brown has remained an independent, full-service investment firm for over 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

### CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant, ever-evolving culture that we have built over the years. These values are the cornerstone of our culture and the 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 – all with diverse backgrounds and experiences to share from around the globe. 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. A recipient of a Canada's Volunteer Award from the Government of Canada, 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 Investment Assistant to join our award-winning firm in our Vancouver office, where you'll be working in a highly successful, fast paced, seven-person team with Christina Anthony.**

### WHAT YOU'LL DO

You will provide support to a group of Investment Assistants, while you learn the business inside and out, with an opportunity for growth within the role. You will also support the Executive Assistant and Investment Advisor. The ideal candidate has strong multi-tasking skills, natural client service orientation and takes pride in their work. They can quickly pivot between tasks and think proactively. You will gain unmatched experience in the finance industry, while working with a fun team.

The team has a full-service model tailored to high-net-worth individuals and families. Always putting clients first and looking for opportunities to go the extra mile, the team members enjoy working together while learning from and supporting each other. The ideal candidate has a similar client-first philosophy and works well in a very fast paced, team environment.



## RESPONSIBILITIES

- Manage daily client requests including coordination and task management
- Assist with client outreach including email, correspondence, and telephone communication
- Submit documents through DocuSign for withdrawals from accounts (RRSP, TFSA)
- Send Letter of Authorization and coordinate fund transfers for third party transfers
- Complete and coordinate wire transfer forms
- Initiate and track account transfers
- Provide daily, weekly, and monthly reporting
- Prepare materials for client meetings
- Various aspects of general administration
- Manage a variety of day-to-day operational and administrative responsibilities, including contributing to special projects

## COMPETENCIES

- *Analysis* – Able to analyze both qualitative and quantitative data to identify key themes, insights or issues or support decision making, critically evaluate information, separating relevant details from noise and provide input into decisions by interpreting information in context
- *Coordination* – Able to coordinate complex activities, aligning people, resources, and timelines to achieve goals efficiently, manage competing priorities, ensuring clarity, accountability, and timely completion of tasks and proactively identify and resolve barriers that impact coordination or goal achievement
- *Customer Service* – Able to manage diverse and complex customer needs, ensuring accurate, timely, and policy-compliant resolutions, identify underlying customer concerns and recommend proactive solutions or improvements and balance multiple customer priorities, maintaining high levels of satisfaction and efficiency
- *Digital Literacy* – Able to adapt and apply advanced digital tools and systems to improve efficiency and effectiveness, integrate and analyze information from diverse digital sources for decision-making and model safe and responsible digital practices in day-to-day work
- *Investment and Portfolio Management* – Able to assist with basic investment tasks, research and support, support the proactive and effective management of client accounts and communication with clients and demonstrate awareness of fundamental investment principles and risk factors.
- *Product Knowledge* – Able to independently maintain in-depth knowledge of key products, applications or services, address client or customer inquiries effectively with relevant details about products, services, tools or applications and identify potential product or service improvements.
- *Regulatory Knowledge* – Able to independently ensure compliance with standard laws and regulations in daily work, provide guidance to others on basic compliance issues and stay informed about updates to relevant regulatory requirements

## KNOWLEDGE AND EXPERIENCE

- Post-secondary education and previous administrative assistant experience or investment assistant experience
- Exceptional verbal and written communication skills
- Articulate, tactful and confident interacting with clients
- Exceptional attention to detail and skilled at working efficiently and accurately
- Diplomacy and professionalism in handling confidential material and correspondence
- A team player with a proven track record of building trusting and productive relationships with colleagues and clients alike
- Strong analytical and organizational skills, with the ability to manage multiple priorities



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- Disciplined, driven and operates with a high level of accountability
- Intermediate knowledge of Microsoft 365
- Knowledge of Broadridge's Dataphile and/or Salesforce is an asset
- Completion (or willing to register for) the Canadian Securities Course and the Conduct and Practices Handbook Course to meet the qualifications necessary to be approved as an Investment Representative

## WHAT WE OFFER

A culture of openness, collaboration and respect is foundational to our firm. We are a diverse, driven group of individuals who genuinely care about one another and encourage and appreciate each other's contributions. We believe in rewarding team members and do this by providing a competitive total rewards package that is fair and equitable; mentorship programs; flexible work options; and a variety of professional development opportunities to expand your career. This role has an expected salary and commission range of \$55,000 – \$65,000/year, plus the potential for bonuses.

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 role, we invite you to submit a cover letter and resume (quoting job requisition 1000-4) to [careersca@odlumbrown.com](mailto:careersca@odlumbrown.com) by **May 16, 2025**.

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.