



## Registered Accounts Administrator – Vancouver

This year, Odlum Brown Limited celebrates its 98<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 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 the opportunity for a Registered Accounts Administrator to join our award-winning firm in the Vancouver head office.**

Reporting to the Supervisor, Registered Accounts, we are seeking an experienced Registered Accounts Administrator with strong knowledge of registered plans and products. The ideal candidate is client service-focused, detail-oriented and driven to provide exemplary support to advisory groups in a fast-paced environment.

### RESPONSIBILITIES

- Record client information and process forms for account activity related to registered accounts (RRSP, RRIF, RESP, RDSP and TFSA)
- Process registered accounts tax reporting
- Respond to day-to-day inquiries and requests from internal and external clients in a timely manner
- Participate in training new and existing colleagues and assistants on registered accounts



- Contribute and lead continuous improvement initiatives related to best practices, operational efficiency and service levels
- Work closely and collaboratively with team members across the firm

## KNOWLEDGE AND EXPERIENCE

- 3+ years of registered accounts and account opening experience with extensive knowledge of various registered plan types
- Experience in a financial institution with a solid understanding of CRA rules and trustee obligations for registered products
- Working knowledge of financial regulatory requirements on registered products, tax reporting, anti-money laundering and compliance
- Ability to exercise good judgement and decision-making within a policy and regulatory framework
- Strong client services skills, with a keen eye for detail and the ability to work efficiently and accurately
- Proven 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
- Excellent verbal and written communication skills
- Experience with the Broadridge Dataphile or similar bookkeeping system
- Intermediate proficiency in MS Office (Word, Excel, Outlook)
- Completion of the 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](mailto:hr@odlumbrown.com) by **November 8, 2021**.

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 by October 25, 2021.

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.