



Supervisor, Client Services – Vancouver

WHO WE ARE

Anchored in our purpose to help clients achieve their financial goals, Odlum 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 a Supervisor, Client Services to join our award-winning firm in the Vancouver office.

WHAT YOU'LL DO

Reporting to the Manager, Client Services, you are a subject matter expert in Client Services operations and will manage the day-to-day processes in our Client Services department. The ideal candidate is analytical, process-driven and seasoned at juggling competing priorities and ensuring tasks are executed with speed and accuracy. This role will provide you with the opportunity to apply your passion for team development and desire for continuous improvement, while delivering exceptional client service.



RESPONSIBILITIES

- People Leadership
 - Inspire, coach, support and develop various Client Services teams
 - Conduct formal performance review activities, coaching for performance throughout the year
 - Support the continuous learning and development of team members
 - Leverage the talent management program to identify and mentor emerging leaders for succession planning initiatives
 - Recruit internal and external candidates using best-in-class recruitment practices that align with the firm's core values
- Process Management
 - Coordinate and supervise activities required for the effective day-to-day operation of various Client Services teams
 - Support training programs directed towards our investment advisory team
 - Review and improve existing practices and streamline department processes
 - Provide guidance to the team on responding to exception scenarios and addressing challenges while considering various stakeholder concerns
 - Anticipate challenges and plan strategically for future growth opportunities
 - Develop subject matter expertise for all facets of Client Services requirements including creating reference manuals
 - Provide support and guidance to Client Services teams for addressing complex issues and responding to questions
 - Maintain high level of data accuracy for assurance in quality output

KNOWLEDGE AND EXPERIENCE

- Minimum of three years of Transfers, Tax Reporting, Corporate Actions, Securities or related experience
- Minimum of two years of proven people leaderships skills
- Undergraduate degree in Business or Finance or equivalent work experience in a business-oriented discipline
- Strong business acumen, excellent decision-making skills and judgement
- Self-confident team player with the ability to develop positive and productive relationships
- A high degree of self-discipline with superior time management and organizational abilities to juggle multiple competing priorities
- Ability to leverage technology to identify, streamline and implement process improvement opportunities
- Proven ability to deliver results within prescribed deadlines
- Excellent verbal and written communication skills
- Ability to problem solve and exercise good judgement and decision-making within a regulatory framework
- Proficiency in the ATON transfer system
- Experience with Broadridge's Dataphile platform or similar data processing system
- Proficiency in MS Office (Outlook, Word, Excel and PowerPoint)



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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 of \$70,000 – \$80,000/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 to careers@odlumbrown.com by **May 31, 2024**.

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.