Steadyhand

Steadyhand Investment Management is an employee-owned Canadian investment management company whose mission is to help Canadians build their wealth through a better, more human experience. For more information, see https://www.steadyhand.com

Job Description: Associate Advisor /Client Support (Vancouver, Full-time, Permanent)

Responsibilities:

As a boutique firm, we are looking for team members who share our passion for creating a top-tier investment experience for all Canadians, and who are aligned with our investment and client service philosophy. We are an organization that respects everyone's input and values teamwork. Employees must be flexible as to their job duties and time commitment.

This is a diverse client-facing role involving many facets of our business, ranging from providing limited advice to being an expert on onboarding or coordinating complex account scenarios. The team member will initially be expected to perform the following duties:

- Work closely with and support our Investor Specialists in their work with clients.
- Assist in onboarding of new client account application forms and other documentation.
- Manage estate, trust and complex locked-in plan transfers.
- Help organize and participate in client events (e.g., seminars, webinars, and other events). Contribute to a positive work environment and help back-up other team members on other duties.
- Provide limited advice to clients on the phone, e-mail, and in person.
- Follow-up with clients and prospective clients on unresolved issues.
- Maintain an intimate knowledge of our products, services, and research.

This is a permanent, full-time position located in Vancouver. We anticipate that you will be in the office a minimum of three days per week, while the remainder can be at home if desired.

The Candidate:

Candidates should possess the following attributes and skills:

- Passionate about client service – willing to go the extra mile for the client.
- Experience and knowledge of various registered plan types (RRSP, RRIF, TFSA, etc.) and estates
- Excellent listener with a high level of Emotional Intelligence.
- Possess outstanding written and verbal communication skills.
- Technology savvy, familiar with MS Office applications.
- Maintain up to date knowledge of regulatory and compliance environment.
- Independent and self-motivated to achieve goals.
- Completion of either Investment Funds in Canada (IFC) or Canadian Securities Course (CSC).
- Dedicated to building a career in the wealth management industry.

Individuals meeting the criteria above are encouraged to submit their resume to Isabel Lee at McNeill Nakamoto Recruitment Group by emailing their resume and cover letter to isabel@mcnak.com. For questions, Isabel can be reached at 604-662-8967 ext. 102 in confidence. While we thank all candidates for their interest, only selected individuals will be contacted for follow-up.

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