Steadyhand

Steadyhand Investment Management is a Vancouver-based employee-owned investment management company whose mission is to help Canadians experience better client returns from their investments. For more information, see http://www.steadyhand.com

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

Responsibilities:

As a small firm, we are looking for employees who share our passion for making our clients better investors, and who are aligned with our investment and client service philosophy. We are building 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 role as you will be involved in many facets of our business. This role may be a launching pad to a full advisor role. The team member will initially be expected to perform the following duties:

- work closely with and support our Investor Specialists in Vancouver
- assist in preparation of new client account application forms and other documentation
- 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
- maintain a working knowledge of capital markets in general
- help manage our office environment
- help organize and participate in client events (e.g., seminars, webinars, and other events)

This is a permanent, full-time position, with phone coverage required in the afternoons until 5:30pm.

The Candidate:

Candidates should possess the following attributes and skills:

- passionate about client service – willing to go the extra mile for the client
- specific experience providing client service to individual investors
- flexible in dealing with different types of clients
- excellent listener, comfortable with telephone conversations
- extremely detail-oriented
- a multi-tasker, able to prioritize
- relevant licensing
- personable, approachable and out-going
- outstanding written and verbal communication skills
- technology savvy
- independent and self-directed
- university or college education preferred
- knowledge of regulatory and compliance environment
- experience and knowledge of various registered plan types (RRSP, RRIF, TFSA, etc.)
- dedicated to building a career in the wealth management industry

Individuals meeting the criteria above are encouraged to submit their resume to Alana Briggs at McNeill Nakamoto Recruitment Group by emailing their resume and cover letter to alana@mcnak.com. For questions, Alana can be reached at 604-662-8967 ext.103 in confidence. While we thank all candidates for their interest, only select individuals will be contacted for follow-up.

October 2018