

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: Operations Specialist (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. The team member will initially be expected to perform the following duties:

- assist the client service and backoffice teams with client enrollment and follow-up
- assist in the processing of new client account application forms, trades, and other documentation
- manage the account transfer process from other institutions
- process and reconcile daily cash movements into the funds
- monitor and reconcile daily valuations
- follow-up with Investor Specialists on unresolved issues
- help manage our office environment
- other general administrative duties

This is a permanent, full-time position, starting at 7am daily.

The Candidate:

Candidates should possess the following attributes and skills:

- passionate about client service – willing to go the extra mile for the client
- extremely detail-oriented
- a multi-tasker, flexible, able to prioritize
- personable, approachable and out-going
- outstanding written and verbal communication skills
- technology savvy, advanced knowledge of PC software applications
- independent and self-directed
- university or college education preferred
- mutual fund backoffice experience an asset
- knowledge of regulatory and compliance environment
- experience with Fundserv and mutual fund recordkeeping systems is an asset
- experience and knowledge of various registered plan types (RRSP, RRIF, TFSA, etc.)

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.