Investment Services Administrative Assistant

Surrey, BC

Job Posting #MW202206

Macnaughton & Ward Financial Services Ltd. is seeking an Investment Services Administrative Assistant for our company. Macnaughton & Ward Financial (MWFS) helps clients insure, invest and protect their future security with insurance and financial solutions. The company was established in 1975 and continues to provide a high standard of service and support to our clients. The Investment Services Administrator is paramount to all aspects of administration and marketing of the business.

About the Position:

The primary duties of the Investment Services Administrative Assistant are to administer and oversee the client product processes for Macnaughton & Ward Financial. Knowledge of Fixed Term (GIC) Deposits, Segregated Fund products, and Individual Life Insurance and related change and service forms for our key partner companies. Initiate client onboarding and service change forms in preparation for the President's client meetings. Contact clients to schedule meetings with our advisors at required intervals.

Key Accountabilities

- Work closely with President to accurately and efficiently prepare client documents and forms prior to (or during) client appointments; maintain daily communication with and provide support on MWFS client files;
- Administer all MWFS client inforce service notifications from each carrier and provide customer administrative service;
- Review and submit all new and maturing Fixed Term (TFSA/GIC/RRSP/Advantage) accounts from MWFS advisors;
- Administer the Deposit Business (GIC) applications and maturities and complete professional correspondence with each client and each advisor;
- Prepare each client investment portfolio report package and all customer correspondence. Verify output and distribute MWFS Client Portfolio reports;
- Lead the seasonal client data contact process ensuring routine outreach output information is accurate;
- Input daily Deposit Broker rate updates on company websites;
- Arrange meeting time for client appointments for MWFS clients, plan the client visit annual meeting schedule to achieve current and ongoing clients' insurance and investment needs.
- Implement and manage the outgoing client correspondence and make new client contact by telephone; prepare MWFS introduction client letter; schedule appointment with advisor;
- Lead the plan for Tax Season so best practices are in place: update systems, collect payment and e-file prepared tax returns while ensuring timely completion of seasonal income tax returns and update procedure manual ongoing;
- Administer the Tax Return process by reviewing the submitted client tax slips and request any outstanding required items and then package all completed tax returns and ready for pickup;
- Handle incoming customer telephone calls and emails and respond to client and carriers' service requests appropriately;
- Marketing meetings: Schedule regular team meetings and coordinate seasonal advertising, distribution of client letters, sales campaigns, sales initiatives and promotional pieces in cooperation with the Marketing & Communications Administrator;

- Provide support for group insurance customer inquiries and claims queries;
- Maintain up-to-date client and account records of communications using established procedures in systems and software.

Required Skills, Competencies and Attributes

- The company will provide training to those without insurance and investment experience providing you have adequate existing administration skills;
- Proven ability to work to deadlines with a daily systemized routine;
- Possess a "take charge, and can do" attitude and able to work with management team and work independently;
- Ability to escalate challenges and review next steps with your manager;
- Takes initiative and communicate in a timely manner;
- Excellent time management and organization skills a must;
- Excellent telephone communication skills and strong command of English, both written and verbal. Ability to recognize and receive our various types of customers;
- Personable, friendly, calm, diplomatic, cooperative demeanor with excellent customer service skills;
- Familiarity and comfort with database input.

Education

- High School Diploma required;
- LLQP an asset for insurance and investment product terminology and understanding;
- Post-Secondary Diploma, Business Administration Certificate or related years of experience; and
- Canadian Deposit Course or equivalent an asset.

Diversity

Diversity in the workplace, one of our shared values, lies at the heart of our rewarding, open, supportive and inclusive work environment. We respect and respond to the many competing and evolving priorities in our lives so you can focus on what you can do best – put clients first.

This is a full-time position with a competitive compensation package.

If you would like to join our team, please send a resume and hand written covering letter, quoting the position and Job Posting # to: careers@mwfs.ca

We thank all candidates for their interest and advise that only those under consideration will be contacted.