JOB DESCRIPTION

Position: **Client Relations Assistant** **Group:** **1**
Reports to: **Assistant Manager, Wealth Operations**

Primary Responsibility / Basic Purpose:

Under direct supervision and within established guidelines, the Client Relations Assistant is responsible to provide a variety of administrative and sales support activities to our team of Consultants and clients in order to develop, build, maintain, attract, and expand relationships. The Client Relations Assistant will provide friendly, professional service in an efficient, financially responsible manner.

Representative Duties:

1. Provide clerical and administrative support to the team.
2. Assist with resolving all aspects of client service related issues whether incoming or outgoing and including follow up on transactional issues, booking appointments, and other related tasks as required.
3. Assist existing and prospective clients' needs by actively listening, promoting, and cross-selling all wealth management products as well as Coastal Community's full products and services offerings.
4. Assist and participate in business development opportunities through sales and marketing campaigns, telemarketing, networking, community and business related endeavours.
5. Assist with all meeting correspondence, reports, and other documents.
6. Support a paperless office environment by imaging and storing documents as per processing standards.
7. Input and maintain CRM software.
8. Actively participate in team meetings.
9. Perform reception duties as required, including answering phone calls and responding to various inquiries,
10. Perform project based and related duties as required.

Required Qualifications:

- Secondary school diploma with academic emphasis.
- Minimum of one years' experience in an office environment.
- Familiarity of all Coastal Community products and services.
- A proven sales record.
- Excellent written and verbal communication skills.
- Demonstrated leadership skills.
- CRM software experience an asset.
- Enrolled in or willing to complete the Canadian Securities Course and Conduct and Practices Handbook within one year of start date.
- Strong client service skills.
- Strong organizational, multi-tasking and time management skills with the ability to prioritize duties within a fast paced environment.
- Have a strong attention to detail.

Required Abilities:

- Proficient with the Windows suite of programs.
- Ability to utilize sound judgement in developing recommendations.
- Ability to build client relationships resulting in expanded share of wallet.
- Ability to multitask while providing quality service.

Skills to Benefit this Position Include:

- Client Service Skills
- Time Management Skills
- Interpersonal Skills
- Problem Solving Skills