JOB DESCRIPTION

Position: **Client Relations Assistant** **Group:** **2**
Reports to: **Assistant Manager, Wealth Operations**

Primary Responsibility / Basic Purpose:

Under general supervision and within established guidelines, the Client Relations Assistant is responsible to provide 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 provides friendly, professional service in an efficient, financially responsible manner. In addition, they must be a self-motivated individual who has the ability to identify and resolve situations independently or with limited guidance and multitask within a high functioning team.

Representative Duties:

1. Follow up on security transactions, transfers, periodic plans, and all other transactional paperwork as required.
2. Handle and resolve all aspects of client service related issues whether incoming or outgoing including follow up on transactional issues, booking appointments, and other related tasks as required.
3. Work with Consultants and Senior Client Relations Assistants to complete complex documentation such as estate documentation with Executors/Beneficiaries/Accountants/Lawyers, Stock Certificates, Swaps, Trust & Estate, etc.
4. Meet existing and prospective clients' needs by actively listening, promoting, and cross-selling all Wealth Management products as well as Coastal Community's full product and services offerings.
5. Pursue business development opportunities by identifying and acting upon leads through sales and marketing campaigns, telemarketing, networking, community and business related endeavours.
6. Prepare professional correspondence and reports including meeting preparation documents and input into financial planning software.
7. Support a paperless office environment by imaging and storing documents as per processing standards.
8. Input and maintain CRM software.
9. Once licensed and within departmental guidelines, process security related transactions with written authorization from the Consultant/Manager.
10. Actively participate in team meetings.
11. Perform reception duties as required,
12. Perform related duties as required.

Required Qualifications:

- Minimum of two years' investment industry experience.
- Minimum of one year financial services experience.
- 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.
- Successful completion of the Canadian Securities Course and Conduct and Practices Handbook.

- Eligible to be IIROC licensed as an Investment Representative within six months 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 and excellent organization and problem solving skills.

Required Abilities:

- Proficient with the Windows suite of programs.
- Proficient with CRM software.
- 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.
- Ability to work independently.

Skills to Benefit this Position Include:

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