Seeking: **Client Service Associate**
Victoria, BC

Who we are

HDF Wealth Management is a Victoria, BC based asset management firm that provides a wide range of financial services to a substantial and diversified client base that includes corporations, financial institutions, medical professionals and high-net-worth individuals. Founded in 2007, the firm combines the expertise of our experienced financial advisory team with the backing of Sun Life Financial Inc. one of Canada's top publicly traded Financial firm. We offer both institutional and private investors custom tailored financial strategies provided with confidence in our client-focused, independent spirit.

HDF Wealth Management is seeking a qualified Client Services Associate to work in our Victoria downtown office.

HDF Wealth has been recognized as one of the top performing team within Sun Life Financial since 2008. We oversee insurance and provide capital management for over 250 institutions and high net worth individuals in the greater Victoria and Lower Mainland. Our team delivers three core value points to our clients: Capital Preservation, Advice and Efficiency of Yield. We are a professional and dedicated group, who think outside-the-box and show up to work every day with a positive attitude and drive to grow our business.

Our work is fast-paced and requires individuals to be proactive and have strong business acumen. This position demands sharp attention to detail and well-developed interpersonal skills and requires you to have a strong work ethic and positive attitude that contributes to growing our business at a fast pace.

Job Duties:

- Account documentation management;
- Ensuring all clients' accounts are up-to-date;
- Executing client trades with utmost accuracy and ensuring timely settlement;
- Client communication – daily, by telephone and written communication;
- Administrating account statements – monthly, by email;
- Commission reconciliation and interest rate calculations;
- Account openings – confirming with the client; following through with signatures and processing with back office;
- Liaising with corporate back office to complete client inquiries and requests;
- Anticipating and identifying potential complications and finding appropriate solutions;
- Depositing client cheques;
- Monthly reporting to the team;
- Accurately establish, maintain, bill, and close assigned accounts in a timely manner, ensuring all department service levels are observed. Processing activities are thoroughly documented and proper documentation is received to and from head office. Ensure processing is within regulatory and firm guidelines for advisory and client accounts.
- Provide quality customer service to clients, correspondents and third party money managers as primary contact for all questions concerning client accounts. Provide detailed, accurate and timely communications to ensure the firm has a reasonable understanding of the operational status of an account.

Qualifications

- An undergraduate degree in Business, Accounting and/or Finance
- Must complete MFDA and LLQP Life Licensed
- 2-4 years' experience within the finance industry;
- Pro-active organizer and solution seeker, wishing to constantly improve their and the team's working environment;
- High level of written communication and excellent verbal communication skills;
- Accurate typing and excellent proof-reading skills;
- Intellectual curiosity and a solid work ethic;
- Strong time management skills;
- Proven teamwork skills and flexibility of approach;
- Flexibility and adaptability to a dynamic, oftentimes loud, fast-paced environment;
- Sharp attention to detail;
- Superior interpersonal skills with both clients and colleagues;
- High level of professionalism;
- Ability to prioritize, multitask, work within time constraints and follow-up;
- Aptitude with numbers and interest rate calculations;
- Excellent telephone demeanor;
- Ability to learn quickly and make sound, timely decisions;
- Able to present a polished appearance in a business formal environment;
- Extensive knowledge of the MS Office package including Word, Excel and PowerPoint;
- Second or multiple languages will be considered an asset;

The HDF Wealth Management Group is an equal employment/affirmative action employer Female/Minority/Disability/Vet.

Send resume to: info@hdfwealth.com