



LICENSED FINANCIAL ADVISOR ASSISTANT

Our client, *Matte & Associates* (www.matteandassociates.com), located in Kelowna, B.C., is a nationally recognized and award-winning financial advisory firm located in Kelowna, B.C. Because they are committed to providing their clients with an exceptionally high level of service, they are expanding their team to include a **Licensed Financial Advisor Assistant** to assist with the daily administration and exceptional growth of the practice.

The ideal candidate will be detail oriented, accountable, responsible, and able to excel in a team-focused environment. Experience in the financial industry is preferred, with licensing in both Life Insurance and Mutual Funds. Primary credentials will include proven experience and success in the financial services industry, Canadian Securities course, Life License, and proficiency in Word, Excel and Outlook. Familiarity with industry proprietary software applications is an asset.

Reporting to the Client Services Manager, the successful applicant will assist in all day-to-day operations as well as provide support to two life and investment advisors.

PRIMARY RESPONSIBILITIES

- Processing and tracking security transactions and transfers
- Managing incoming and outgoing telephone calls with clients
- Responding to requests for information from Advisors and clients
- Servicing clients' general day-to-day requests
- Preparing correspondence and reports
- Maintaining Financial Advisor files
- General office duties as assigned by Client Services Manager

QUALIFICATIONS

- Successful career path in the financial Services industry
- Post-secondary Diploma or Degree preferred
- Completion of the Canadian Securities Course and Life License Certification
- Above average skills in Word, Excel, and Outlook
- Experience with industry proprietary software
- Excellent verbal and written communication skills
- Committed to working and thriving in a team environment
- Ability to multi-task and assist co-workers as required

This is a permanent full-time position with a competitive compensation package and potential for advancement. *Matte & Associates* has built their reputation on team-work and exceptional customer service. A cornerstone of this practice is the value placed by management on the principle of collaborative consultation and mutual respect.. Team members and clients will always be treated in a manner which reflects the company's dedication to the pursuit of excellence and best practices in the provision of wealth management strategies for clients experiencing real world challenges.

Please contact Patrick Walls, Executive Recruitment & Appraisals Inc. at 250-878-4413 to discuss, or email CV in strict confidence to pdwalls@shaw.ca or pat@executiverecruitment.ca