Internal/External Advertisement — November 23, 2022

Full Time Administrative Assistant

VantageOne Financial Corp.

If you are an enthusiastic people person with a demonstrated track record of success in a wealth management administration role, we should talk!

POSTING NUMBER: IA/EX 2022-20

CLOSING DATE: Until Filled

HOW TO APPLY: Please **email** a resume and cover letter to HR@vantageone.net no later than **5:00 pm** on the closing date. Please indicate the advertisement number **(IA/EX -2022-20)** in subject line of email.

We are seeking a candidate to join our wealth management administration team in our Vernon BC office location. Experience is preferred, but not required, as we will train the right candidate. The role is the first point of contact for clients and is expected to interact with everyone with a pleasant, professional, and friendly attitude providing an exceptional client experience.

This role requires someone with solid computer skills, attention to detail and the ability to multitask. This position is expected to work with various software systems, on the phone, in digital meetings and in person. We have a very fast-paced environment with a team of talented, upbeat professionals focused on making sure our clients get the very best.

We offer an outstanding compensation & benefits package including paid vacation time and employer paid RSP contributions. Full training will be provided for this position and our growth rate will support good opportunities for future development.

Who We Are:

VantageOne Financial Corp. is a well-established, busy wealth management subsidiary in Vernon BC. We are a wholly owned subsidiary of VantageOne Credit Union. VantageOne Credit Union’s history reaches all the way back to 1944 when we opened our first branch in Vernon. Since that time, we’re proud to have become a vital part of the local business economy. From the very start, we have seen ourselves as a local business that is deeply invested in our communities.

We are dedicated to the financial well-being of our clients, employees, and communities. Part of what sets VantageOne apart from others is that we offer traditional wealth management services and personal advice in addition to the banking and borrowing solutions offered by the Credit Union.

We welcome applications from all interested; however, only those selected for an interview will be contacted.

POSITION DESCRIPTION

POSITION TITLE:	Administrative Assistant – VOFC
BUSINESS: UNIT/DEPARTMENT:	VantageOne Credit Union VantageOne Financial Corporation
LOCATION:	Wealth Management, North Branch
REPORTS TO:	Operations Manager, Wealth Management

PURPOSE OF POSITION

To provide administrative support to Financial Advisors and assist in creating an exceptional client experience for all clients of VantageOne Financial Corporation.

ROLES AND RESPONSIBILITIES

Administrative Assistance to Financial Planners

- Greet clients in person and ensure they are made welcome with offers of beverages, seating and reading materials until their appointment.
- Greet clients by phone or electronic communications, resolving questions or issues independently or through referral when necessary. The client should always be made to feel they are our priority.
- Manage and organize advisor schedules to make sure calendars are full. Including review appointments, tasked meetings from CRM hotlists and referrals. Make sure rescheduling meetings takes place efficiently where necessary.
- Provide administrative support to financial advisors including detailed completion of preparatory paperwork required by planner, prepare new files with necessary documents in advance of interview. This may include form retrieval and completion from suppliers and WorldSource
- Process advisor paperwork accurately in a timely fashion for dispatch of transfer requests, uploading of documents to the Doc store in WorldSource and Doxim, create tasks from diary notes for future or follow up actions.
- Maintains robust client records in Maximizer CRM including daily product and task updates for clients, referrals, suppliers, accounts documenting product and prospects.
- Maintains accurate digital client files on Doxim in a timely fashion including uploading documents as they are processed or retrieval when required for reference.
- Reconcile trades, accounts follow up and account openings. Follow up to make sure they have settled as intended, accounts are opened, transactions and transfers completed.
- Arranges all mail and courier activities. Organize and distribute correspondence which arrives through postal mail, emails, faxes etc.
- Ability to manage interruptions and assess situations to determine the importance, urgency, and risks, and make clear decisions in the best interest of VantageOne.
- Ability to organize tasks and work independently when given overall goals and expectations.
- Respond to information requests from all business partners, including VantageOne Credit Union account managers and WorldSource Financial Management compliance.
- Availability to support occasional marketing events to represent VOF by assisting with client events, marketing, and special event mail outs.

Other Duties as Assigned

EDUCATION & EXPERIENCE

Education:

- High School Diploma and 1- 3 years post-secondary education in business administration.

And

Job Related Experience:

- 1 - 3 Years in an administrative support position or office manager with a financial institution/credit union or financial planning office.

Or

- The equivalent combination of education and experience acceptable to VantageOne Financial Corp.

SKILLS AND KNOWLEDGE

1. **Accounting**
   Familiarity with daily processes of processing transactions and general reconciliation. Preparation and reconciliation of financial summaries and statements. Ability to understand and explain client statements and follow up on transactions until successful completion.

2. **Administrative Processes**
   Working knowledge of administrative processes, policies, procedures, and practices as they relate to the administrative duties of an office. Also requires familiarity with Credit Union processes.

3. **Communications**
   Working skill and knowledge of professional verbal and written communication skills required to liaise with clients, staff, and suppliers effectively

4. **Core Products and Services**
   Familiarity of Credit Union products and services to facilitate enable identification of x-referrals to other VOFS services.

5. **Specialized Products and Services**
   Familiarity of financial and insurance products and services to provide appropriate administrative support to the Financial Planners. Including a familiarity of wealth management products and services including RRIFs, self-directed RRSPs, RESPs, estate planning, insurance sales documentation and/or administration, financial planning and mutual funds and securities. Sufficient knowledge of the products and services to complete documentation or make a referral of direct inquiries.

6. **Regulations/Legislation/Credit Union System**
   A working knowledge to ensure administrative compliance for stakeholders; FICOM, Insurance Council, Investment Dealer Association along with supplier marketing and trademark application to promotional materials. Administers licensing requirements for people and premises with appropriate governing bodies.

7. **Insurance**
   A familiarity of specialized insurance products such as life and annuity to provide appropriate administrative support of sales documentation and/or the administration of documents for the Financial Planners.

8. **Computer-Based Systems Operation**
   Working knowledge of online supplier software and sites, Microsoft Office, CRM, and financial wealth management software for the purpose of retrieving, updating and manipulating information on a computer including PC-based systems incorporating word processing, accounting, spreadsheet, database, and internet applications; electronic funds transfer.

9. **Marketing**
   Familiarity with various aspects of marketing coordination, including initiatives in mass member communication, seminar organization, brochure updates, newsletter compilation, Ask an Expert Sessions and other related special presentations.

10. **Sales and Service**
    Familiarity in this area is required in this position as it refers to the application of customer service needs including analysing needs and identifying opportunities for cross selling, referring potential business opportunities to specialist staff.

Strengths and Talents

Striving Strengths & Talents	**Thinking Strengths & Talents**	**Relating Strengths & Talents**
• Ability to Achieve • Desire to Succeed • Competent • Committed to be of Service to Others • Ethical • Available	• Focused • Disciplined • Able to Arrange • Responsible • Problem Solving Ability • Committed to Accuracy	• Empathetic • Caring • Team Player • Ability to build and sustain relationships • Partnership and Advice Focused • Positive Attitude

PHYSICAL REQUIREMENTS

Physical exertion- Occasional less than ¼ of the time which includes stooping, reaching, pushing, pulling and/or lifting.
Visual attention – Constant more than ¾ of the time, this may include intense reading of documentation or data, close monitoring of computer screens or detailed work.
Travel – Minimal Travel. Travel either day to day or overnight on VantageOne business is not required in this position.
Manual Dexterity – Frequent between ½ and ¾ of the time this includes computer keyboarding or mouse work for a significant portion of the workday. 40 Wpm minimum Keyboarding Skills.

NATURE OF SUPERVISION

Immediate Supervisor	**Operations Manager, Wealth Management**
Supervisor Responsibility	**None**
Positions Supervised	**None**