



Career Opportunity

WHAT: Marketing Assistant, Financial Services, Permanent Fulltime
WHEN: Immediate
WHERE: Vancouver – Broadway and Burrard

Arbutus Financial is a comprehensive financial services firm, serving the needs of individuals, companies, business owners and their families. Located in Vancouver, we have a thriving practice, brilliant and thoughtful clients, and a fun and dynamic work environment. Our team is committed to our clients and to each other both personally and professionally. We hold values that are Professional, Accountable, Committed and Thorough – this is our PACT. We are world class at what we do, how we treat each other and our clients and what we contribute to our community. We take our roles seriously and enjoy a joyful team spirit, as we work together to nurture the needs and dreams of our clients.

As a key part of the Arbutus Financial family, you will be responsible for research, analysis, and preparation of financial planning recommendations for our clientele. You will work closely with Client Relationship Managers on client communication, meeting preparation and presentations.

Some natural gifts you possess are resourcefulness, accuracy, strong analytical skills, high capacity for learning, flexible, ability to work independently and as part of a small team, kind, warm, sense of humour and above average Word, Excel and Powerpoint skills. As well, you will be a self-starter with the ability to make choices that are in service of the team and our clients. Finally, you will be a clear and professional communicator with a desire to write, report and represent Arbutus Financial in various ways.

Major Responsibilities and Duties

1. Research and Analysis

Working with the Financial Advisor, your opportunity will be to analyse the situation and develop financial solutions that address our client's needs. You will use your skills and knowledge of financial planning software and familiarity of financial vehicles (eg insurance, investments). There will be client contact to gather additional information.

2. Communication and Presentation

Here you will use your varied communication strengths. Once the initial analysis is complete, you will document our recommendations in "client-suitable" formats. These include written reports, spreadsheets, charts and powerpoint presentations. You may also be asked to support the team with the formal presentation to our clients.

3. Implementation

In conjunction with our administrative team, you will manage the implementation steps to complete the recommendations and action items.

4. Service

Service to and relationships with our clients is key. You will be in regular contact with our clients to ensure their financial planning is kept current with changes in their lives. You will assist with managing regular client and customer contact, to ensure they are well served through the year.

5. Administrative Support

You will be working in conjunction with our administrative team, especially during peak times.

Strengths

- You strive for **accuracy** when completing daily activities, including but not limited to, filing, preparation of paperwork and recording of information.
- You love being **organized** to the extent of knowing the workflow in process, and ensuring deadlines are met as required.
- You are clear on how to **prioritize** projects, daily work and assignments.
- You know how to **ask for help** or more time to meet milestones and deadlines.
- You understand **accountability** in the completion of tasks assigned.
- You will work with established **procedures** as outlined in the AFS Procedure Manual, and be supported through ongoing team training.
- You will thrive on **communication** with advisors and staff on a regular basis to keep them informed of the status of work items.
- You pride yourself in your **proficiency and knowledge** in the operation and procedures of software applications required for your position.
- You **excel** in the operation and procedures of Maximizer, MS Office, and other core investment, insurance and financial planning software.
- You are naturally **resourceful and creative** in seeking out answers from various sources, both internal and external.
- You will **maintain** strategies and procedures to effectively manage electronic and print information.
- You know what to do, how to be and when to make the best choice for yourself, the team, the client and the community where you work, live and play.

Compensation is commensurate with experience and abilities. This includes an attractive base salary, a great work environment, benefits plan and additional individual and team recognition for commitment and performance.

If this full-time position with Arbutus Financial is of interest to you, please email your resume and cover letter to Dana Russell – drussell@arbutusfinancial.com. Thank you.