



## Careers: **Administrative Assistant, Financial Services**

Type: **Full time/Permanent**

### General Description

Arbutus Financial Services (AFS) 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 and a fun dynamic work environment with great people. We pride ourselves in holding 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.

### Position Summary

This role is ideal for self-starting, personable, experienced administrators looking to take the next steps in their career paths. As a key part of the Arbutus Financial family, you will be responsible for being the face of AFS for clients entering our offices. This position is for people who have an entrepreneurial spirit, and flourish in a positive and fast paced environment.

### Responsibilities

- Developing the client experience in the office.
- Participating in client meeting preparation for advisors.
- Processing paperwork/follow up for investments and insurance.
- File management for physical/electronic file infrastructure.
- Managing and maintaining the database (Maximizer CRM).
- Office management.
- Investment Administration (Dataphile).

### Strengths

- Very strong organizational skills.
- Strong Interpersonal/communication skills.
- Strong MS office skills.
- Resourceful and creative in problem solving.

### Desired Experience

- 5 years administrative experience
- MFDA/IIROC experience is an asset

If this full-time position with Arbutus Financial is of interest to you, please email your resume and cover letter to Neil Menzies – [nmenzies@arbutusfinancial.com](mailto:nmenzies@arbutusfinancial.com). Thank you.