

Job Title: Financial Administrator
Company: Cremasco Financial
Location: Guelph, Ontario
Job Type: Full-Time | Permanent

About Us

Cremasco Financial is a well-established and trusted financial services firm located in the heart of Guelph, Ontario. For over 40 years, we've helped individuals, families, and businesses achieve their financial goals through tailored advice, investment planning, and risk management strategies. We pride ourselves on our client-focused approach, integrity, and commitment to long-term relationships.

Position Overview

We are seeking a highly organized and detail-oriented **Financial Administrator** to join our growing team. This individual will play a key role in ensuring the smooth day-to-day operation of our financial advisory practice. The ideal candidate is someone who thrives in a dynamic environment, has a passion for financial services, and brings a proactive, team-oriented mindset.

Key Responsibilities

- Manage client account documentation and data entry into financial planning software and CRM systems
 - Process investment applications, transfers, and transactions accurately and efficiently
 - Prepare reports, account summaries, and meeting materials for advisors and clients
 - Handle inbound and outbound communication with clients, financial institutions, and vendors
 - Maintain compliance with industry regulations and internal procedures
 - Administrative finance functions as needed
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Qualifications

- Minimum 2+ years of experience in financial administration is an asset, bookkeeping, or related field is an added benefit
- Post-secondary education in Business, Finance, Accounting, or equivalent experience is an added benefit
- Proficient in Microsoft Office Suite (especially Excel, Word, Outlook)

- Experience with financial planning software and CRM systems an asset (e.g. Equisoft, Broadridge or Fundserv)
 - Strong organizational and time management skills with high attention to detail
 - Excellent written and verbal communication skills
 - Ability to handle sensitive information with discretion and professionalism
 - Familiarity with investment, financial planning products and insurance is a strong asset
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Why Join Cremasco Financial?

- Work with a collaborative and supportive team in a positive work environment
 - Opportunities for growth and professional development
 - Competitive salary based on experience
 - Paid vacation, health benefits, and RRSP contributions
 - Convenient Guelph location
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How to Apply

Please submit your resume and a brief cover letter outlining your experience and interest in the role to robin@cremasco.com. We thank all applicants for their interest; however, only those selected for an interview will be contacted.
