

Full-Time Administrative Position - Financial Planning Office

Location: Owen Sound

Hours: Monday to Friday, 8:30 AM to 4:30 PM

Overview: AN EXCELLENT ENTRY LEVEL POSITION FOR AN INDIVIDUAL WHO WISHES TO BUILD A CAREER IN FINANCIAL SERVICES. We are seeking a detail-oriented and personable, administrative professional to join our Financial Planning Office in Owen Sound. The ideal candidate will have a strong background in financial administration, with experience in uniFide platforms and Dataphile or similar programs.

Key Responsibilities:

- Provide comprehensive administrative support within a financial planning environment.
- Utilize financial software and platforms for data management and client interactions.
- Assist with client communications and maintain professional, confidential relationships.
- Manage various administrative tasks to ensure smooth office operations.

Qualifications:

- Proven experience with uniFide platforms like Dataphile or similar.
- Proficiency in Microsoft Office Suite and CRMs.
- Additional investment courses, financial administrative experience, and relevant licensing are advantageous.

Personal Attributes:

- Excellent interpersonal skills with a client-focused approach.
- Strong organizational and multitasking abilities.

Additional Information:

- This role is suited for individuals interested in either remaining in an administrative capacity, or interested in the potential for career advancement to a financial advisor position based on performance and experience.

Compensation:

- Salary is commensurate with experience and licensing, ranging from \$25 to \$30 per hour.

Application Process:

- Interested candidates should submit their resume and a cover letter detailing their qualifications and experience.

Job Type: Full-time

Pay: \$25.00-\$30.00 per hour

Expected hours: 35 per week