Role Description

Reports to
Senior Account Manager

Seniority level
Mid level

Status
Full-Time (40 hours/week)

Associate, Charitable Investment Programs

Role Summary

Reporting to the Senior Account Manager, Charitable Investment Programs, you will provide professional and detail oriented administrative support to the Charitable Investment Programs team.

As a key administrator, you will work closely with the Senior Account Manager in developing systems and processes to manage and grow advisor team relationships, facilitate transactions of publicly traded securities, and ensure the accurate and timely maintenance of records.

What You'll Do

Systems & Processes

- Collaborate with the Senior Account Manager to open new investment accounts and maintain accurate records of transactions and client records, with a focus on streamlining processes, increasing efficiency, and ensuring the highest level of data security.
- Maintain the client relationship management database, ensuring relevant data is accurately recorded and organized.
- Facilitate donations of publicly traded securities and ensure effective administration of donated assets.
- With a lens on risk mitigation of compliance. Identify ways to improve our gift acceptance systems.
- Administrative support as required by the Charitable Investment Programs Team

Advisor & Donor Experience

- Manage and nurture advisor team relationships, providing excellent customer service and attentive support.
- Provide information in response to inquiries about the Charitable Investment Program and answer questions from internal and external stakeholders
- Work with donors, advisors, and Philanthropic Advisory Team to ensure a seamless experience.
- Assist with the production, quality assurance, and distribution of donor-facing Charitable Investment Account statements.

What We're Looking For

- BBA, BComm, or equivalent.
- 3+ years of administrative experience in the financial sector.
- 3+ years' experience in a customer/ client-facing role.
- Knowledge in investments or wealth management industry
- A strong aptitude for process and administration.
- Must exhibit values of trust, accountability, and discretion.
- Outstanding oral and written communication skills.
- The ability to prioritize tasks and multiple projects under demanding circumstances.
- Relationship building skills, driven, and proven record of meeting and exceeding goals.
- Exceptional attention to detail.
- Desire to learn complex concepts around charity, finance, and technology

Bonus Points

- Experience working as an Associate / Assistant Investment Advisor at a Canadian Investment firm
- Experience within the charitable sector.
- Experience working in a technology startup environment.
- Experience using Salesforce, Confluence, Jira, Google Suite, Help Scout.

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