



## *Administrator, Client Services*

**Department:** Client Services  
**Reports to:** Vice President, Client Services  
**Employment Type:** Permanent Full-Time

### **OVERVIEW OF POSITION:**

The Administrator contributes to the efficient day-to-day operations and supports the work of the Client Services department and staff.

### **JOB RESPONSIBILITIES:**

The Administrator is required to perform a range of duties including, but not limited to:

#### *Department administration*

- Use computer word processing, spreadsheet, and database software
- Sort incoming mail and faxes for filing
- Prepare and send outgoing faxes, mail, and packages
- Answer general inquiries via email, phone, or fax
- Data entry and upkeep of the organization's databases where client services is involved, while ensuring a high level of accuracy
- Provide administrative support to management and other staff in the department
- Coordinate securityholder mailings with internal/external mail houses

#### *Provide support to Vice President and Account Managers*

- Maintaining records, weekly, for management meetings
- Research, edit, and circulate data
- Aid in maintaining organization and stock within the department

#### *Reception*

- Cover the receptionist for breaks and lunch
- Maintaining a professional, friendly and courteous manner
- Answer general phone inquiries
- Direct phone inquiries to the appropriate staff member
- Greet visitors to the organization

#### *Other Duties*

- Other duties may be assigned as necessary.
- Flexibility with working overtime when required.

## QUALIFICATIONS:

- Post Secondary Education and/or minimum 1 year experience in financial, corporate/commercial or securities industry.

*Proficiency in the use of computer programs for:*

- Microsoft Office Suite (Word, Outlook, Excel)
- Database Management
- Internet

## ATTRIBUTES:

The Administrator will demonstrate competence in the following areas:

- *Relationships:* Maintain positive working relationships with others, both internally and externally.
- *Communication:* Excellent/effective oral and written communication skills.
- *Teamwork:* Work cooperatively and effectively with others to set goals, resolve problems, and make decisions to enhance organizational effectiveness; ability to undertake self-directed tasks when necessary.
- *Independence:* Ability to work independently, ensuring outstanding matters are addressed in a timely manner.
- *Organization:* Excellent time management skills; attention to detail; the capacity to prioritize by assessing situations to determine urgency; ability to develop a work schedule, set goals, create / implement actions plans and monitor progress towards goals; and ability to make clear, timely decisions.
- *Assessment:* Anticipate, understand, and respond to the needs of peers, clients and securityholders to meet or exceed their expectations. Read and analyze documents thoroughly. Attention to detail is very important. Willingness and ability to adapt to changes and responsibilities.