



JOB TITLE: Team Leader, Administration
DEPARTMENT: Administration, Guardian Capital Advisors LP (“GCA”)
REPORTS TO: Vice-President, Operations and Administration (ON)/Client Portfolio Managers (BC)
LOCATION: Vancouver, BC

JOB STATEMENT:

The Team Leader, Administration will be responsible for supervising four administration staff and providing administration support to the Portfolio Managers. The Team Leader will also be responsible for providing accurate and timely reporting to clients, and to efficiently onboard new client accounts. These responsibilities require strong relationship management skills with all levels of staff and with clients and referring agents.

ESSENTIAL FUNCTIONS:

- Leading and supervising the administration staff in the Vancouver office to ensure a high standard of service and support to Portfolio Managers, clients and referring agents;
- Overseeing the office management function;
- Overseeing staff duties and roles, ensuring that tasks are executed accurately and on a timely basis and that deadlines are met;
- Working with the VP, Operations and Administration and other team members in other locations to introduce improvements in streamlining processes, workflows and eliminating errors;
- Administering new account documentation, client contracts (including Investment Policy Statements) and transfers, ensuring procedures are followed;
- Working with the Portfolio Managers on various initiatives including compliance, taxation, reporting, etc.;
- Liaising with head-office in establishing new referral agreements and supporting referring advisors;
- Coordinating, assembling and distributing annual tax packages for clients;
- Assisting with the verification of the quarterly management fees; and
- Coordinating and assisting with the distribution of quarterly client reports.

QUALIFICATIONS:

- University degree, preferably in business, finance or economics
- Experience supervising staff in a high-paced environment
- 3-5 years investment administration experience, especially dealing with clients and referring agents
- Successful completion of the Canadian Securities Course
- Strong time-management and interpersonal skills
- Ability to show initiative and problem-solve
- Ability to multi-task and maintain confidentiality
- Ability to work independently as well as within a team environment
- Excellent written and verbal communication skills
- Excellent knowledge of Microsoft Word, Excel and MS Dynamics (CRM)

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@guardiancapital.com. Guardian Capital is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Guardian Capital will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview. We thank all applicants for their interest but only those selected for an interview will be contacted.