



JOB TITLE: Administration Representative – Registered Accounts
DEPARTMENT: Operations, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Manager, Administration
LOCATION: Markham, ON

JOB STATEMENT:

Reporting to the Manager, Administration and working in a fast paced environment, the Administration Representative will be responsible for processing income funds, automated instructions, and set ups for the MFDA-regulated dealership Worldsource Financial Management Inc. This highly motivated and energetic candidate must have a keen eye for detail and a penchant for accuracy. The candidate will be responsible for analyzing, researching and taking the initiative for resolving issues in a proactive manner.

ESSENTIAL FUNCTIONS:

- Processing income funds;
- Reviewing and updating NSF;
- Reviewing and processing automated withdrawal or PAC set ups;
- Reviewing and processing provincial unlocking and small amount withdrawals;
- Reviewing and processing bankruptcies, court orders and estates; and
- Performing other duties as assigned.

QUALIFICATIONS:

- Post-secondary education
- 4+ years similar experience within the investment industry
- Strong customer focus, service orientation and professional acumen
- Strong attention to detail
- Strong knowledge of Microsoft Office
- Excellent communication, organizational and listening skills
- Dedicated team player with the ability to take the initiative and be independent
- Knowledge of Dataphile, an asset

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@worldsourcewealth.com.

Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource 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.

