



JOB TITLE: Administration Representative (6 Month Contract) – 10 positions
DEPARTMENT: Operations/Administration, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Administration Supervisor
LOCATION: Markham, ON

JOB STATEMENT:

The WWM Operations department has an immediate need for 10 Administration Representatives to support the department for a contract period of 6 months. The contract Administration Representatives will be working in a fast paced environment, taking responsibility for various administrative functions. The highly motivated and energetic candidates must have a keen eye for detail and a penchant for accuracy.

ESSENTIAL FUNCTIONS:

- Setting up new accounts for transitioning advisors;
- Ensuring account transfers are tracked and processed efficiently;
- Imaging documents;
- Following-up on transfers or transitions;
- Updating and maintaining the spreadsheet for transitioning advisors;
- Assisting with general data entry;
- Processing rep code changes;
- Validating statements; and
- Performing other duties as assigned.

QUALIFICATIONS:

- Post-secondary education
- 1-2 years similar experience within the investment industry
- Professional acumen
- Strong attention to detail
- Strong knowledge of Microsoft Office and Excel
- Excellent organizational and listening skills
- Dedicated team player with the ability to take initiative as well as work independently
- Knowledge of Dataphile, ATON, 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.