



JOB TITLE: Registered Products Administrator – 2 Positions
DEPARTMENT: Operations, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Supervisor, Registered Products
LOCATION: Markham, ON

JOB STATEMENT:

Reporting to the Supervisor, Registered Products and working in a fast-paced environment, the Registered Products Administrator will be responsible for all processes and procedures related to the operation of Registered Plans such as Retirement Savings (RRSP), Retirement Income (RRIF), Education (RESP) and Locked In plans (LRSP, LRIF). This highly motivated and energetic candidate must ensure all requests and inquiries from advisors, clients and head office are processed accurately and in a timely manner according to the established service level agreements and that respective control accounts are reconciled by the established deadlines.

ESSENTIAL FUNCTIONS:

- Processing RRSP withdrawals;
- Managing RRIF account administration, including the set up and payout of minimums;
- Managing RESP account administration;
- Performing special processing for estates, home buyers, LLP, marriage breakdown, court orders, etc.;
- Performing recurring events set up and ongoing support (PAC, SWIP);
- Managing control account reconciliation;
- Responding to client service inquiries related to registered products; and
- Performing other duties as assigned.

QUALIFICATIONS:

- Post-secondary education
- Minimum of 4 years registered product administrative experience
- Excellent communication and organizational skills
- Excellent attention to detail and problem solving skills
- Ability to work independently as well as in a team environment
- Knowledge of client tax reporting
- 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.

