



JOB TITLE: Administration Representative – Transfers (2 Positions)
DEPARTMENT: Operations, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Supervisor, Transfers and New Accounts
LOCATION: Markham, ON

JOB STATEMENT:

Reporting to the Supervisor, Transfers and New Accounts and working in a fast-paced environment, the Administration Representative will be responsible for the seamless processing of transfers. 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:

- Ensuring account transfers are tracked and processed efficiently;
- Imaging documents and new client mailing;
- Providing administrative support through EWMS order entry;
- Following-up on self-directed transfers;
- Following-up on Delay in Processing items;
- Adhering to the steps of the transfer process;
- Ensuring service levels are met or exceeded; and
- Performing other duties as assigned.

QUALIFICATIONS:

- Post-secondary education
- 2 –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 work independently
- Knowledge of Dataphile and ISM, ATON or Open Advantage, 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.

