

Careers

You are passionate about customer service.

We have an opportunity for you.

Administrative Assistant

Cornerstone Investment Counsel (Cornerstone) is a privately held wealth management firm headquartered in Calgary, Alberta. Our mission is to deliver an excellent and cost-efficient investment experience, along with comprehensive wealth management services, to entrepreneurs, business owners, professionals, families and individuals who seek to achieve financial freedom.

To support our tremendous growth, we are looking for a highly organized individual to perform administrative and office support activities in our dynamic and multi-faceted firm. This is a great opportunity for a motivated, self-starter who can set priorities, meet deadlines and work in a fast paced, multi-task environment.

This position, reporting to the Client Account Manager, will be responsible for effectively communicating across all levels within Cornerstone, as well as with external organizations and clients.

Role Profile:

The successful incumbent will provide superior customer service in a critical role within the organization. The Individual will act as the representative of the company, being a front-line employee visible to both internal and external customers. The role facilitates and directs the intake and delivery of clients, phone calls and electronic communications between different parties at several locations utilizing a variety of tools and support services. The position will assist with the administrative duties of the business units to provide operational excellence and superior service.

Performance Expectations:

- Work collaboratively in supporting the Business Units
- Populate New Investment Account applications
- Create New Client files and update CSIC databases
- Net Invested Capital updates
- Provide polite, positive and proficient customer service, via reception responsibilities
- Assist with Investment Account Statements
- Other office duties such as: order supplies/organize courier packages, etc.

- Policy Summaries, insurance applications & corporate year end reports for the Insurance Counsel
- Maintenance of office equipment
- Ability to balance a demanding work load and exercise mature professional judgment and discretion in handling confidential and sensitive information.
- Business projects as assigned

Core Competencies:

- Excellent communication skills, with demonstrated ability to effectively convey information in business writing, conversations and interactions
- Possess strong work ethic, with confidentiality and high ethical standards
- Professional telephone etiquette and exceptional customer service skills
- Highly organized, accountable for deliverables, and uses personal judgement in decision making when managing workloads
- The ability to work with fixed deadlines and cope with frequent interruptions
- Team player, detail oriented, self-motivated, patient, hardworking and customer focused
- Understands the importance of quality customer service by being courteous, articulate, responding to requests in a timely manner and monitoring satisfaction

Credentials:

- Two (2) to Four (4) years office experience, preferably in the finance industry
- Completion of post-secondary education in an office administration program is an asset
- Strong Computer skills with proficiency in Word, Excel, Outlook and familiarity with Windows 10 operating systems, including exceptional attention to detail
- Experience with Client Relationship Management software such as Microsoft Dynamics, InDesign & video conferencing would be an asset, however willingness to learn is critical

Total Rewards:

Cornerstone encourages a balanced lifestyle and offers benefits that suit the way our team members work and play! In addition to a competitive salary, our total rewards package includes health and dental benefits, firm sponsored social events and professional development assistance.

Please apply via email with your resume to: dawn@csfg.ca

Cornerstone: Committed to our Clients and You!

Only those selected for an interview will be contacted.