



Retail Operations and Communications Coordinator

Harbourfront Wealth Management Inc. is a fast growing, independently owned firm with offices across Canada. The firm specializes in creating complete wealth management solutions for high net worth clients. We have an opportunity for a qualified Operations Co-ordinator to join us in our downtown Vancouver office. The candidate will be an integral part of the management team, with responsibilities that will grow with us.

We are currently seeking an individual well versed in the retail operations of a full-service brokerage firm to assist the National Sales Manager and the Chief Operating Officer as a liaison between sales and operations personnel, and to assist with supplier evaluation, selection and contracting and with new product implementation project management. The successful candidate will be well versed in brokerage operations and possess excellent communication and project management skills.

You will be responsible for:

- Acting as communications coordinator regarding processes and programs available to retail personnel; this will entail establishing communication channels, setting resolution turnaround standards and ensuring adherence to them
- Providing training on existing and newly implemented operational systems
- Liaison with carrying broker with regard to operational processes, systems and service level expectations
- IA onboarding and transition training support
- Investigation and evaluation of reporting systems available to fulfill corporate needs; assistance with the selection and installation of systems and the creation and rollout of applicable training programs
- Review of operational processes with a view to redesign and optimization of efficiency
- Update of operations manuals relating to various functional areas
- Other duties and projects as requested

The ideal candidate for this position will:

- ✓ Have considerable experience in financial services entities, experience with NBIN CB systems and processes preferred
- ✓ Be familiar with brokerage firm operations, objectives and initiatives
- ✓ Possess strong project and personnel managerial skills
- ✓ Be thorough and detail oriented
- ✓ Have exceptional written and oral communication skills
- ✓ Be a self starter, leader and motivator
- ✓ Be willing to travel extensively within North America

This is an exciting role with great potential for growth. If you are interested in this excellent opportunity, please send an email to: HR@harbourfrontwealth.com



HARBOURFRONT WEALTH MANAGEMENT INC.

This posting will remain open until a qualified candidate is hired. We sincerely thank all applicants who express an interest in this role, but wish to let you know that we will only be contacting applicants that are aligned with our requirements.