



## DIRECTOR OF FIRST IMPRESSIONS

YOU'LL HELP PEOPLE FEEL GOOD BEING HERE  
SO THEY FEEL GOOD BRINGING THEIR BUSINESS HERE.

---

### ABOUT OUR FIRM

Our clients entrust us with their financial well-being, and we don't take that trust lightly. For almost two decades, we've focused on the proven fundamentals of investing: patience, research, and stability. We're not afraid to make uncomfortable calls to create wealth for clients, and they appreciate both our honesty, and our approach.

As a result of those strong relationships, today we have \$1.2 billion of assets under administration, by a team of 25 professionals who passionately share a common vision: to become the wealth management company of choice for our clients, and for our people.

As a proud member of CWB Wealth Management, a subsidiary of CWB Financial Group, McLean & Partners is one of the premier wealth management firms in Western Canada. Drawing on CWB Wealth Management's breadth of experience, knowledge and support allows us to better service our clients and also provides us the ability to serve an extended client base across Western Canada. We look forward to many more decades of continued success together.





---

## OUR PRIVATE CLIENT TEAM AND YOUR ROLE

You'll be the first person clients and visitors see when they walk into the firm. You'll set the tone for us as a company that prides itself on the fundamental hallmarks of client service, give people a reason to talk about the wonderful experience they have here, and reinforce that they made the right choice in McLean & Partners.

You'll also be responsible for maintaining an office environment that matches the brand we've built for our clients and employees. This would include keeping our common areas clean, fully stocked and reflective of the high-end service we provide.

Just as important as client service and office management, you'll also support the Marketing & Communications team in the coordination of internal and external initiatives and campaigns that reinforce our brand story, the maintenance of our CRM & Hubspot platforms, as well as accurate database and marketing reporting.

---

## CRITICAL DUTIES AND RESPONSIBILITIES

- Making guests and clients feel beyond welcomed and respected when they arrive. They expect and deserve nothing less.
- Recording and directing mail, email, and phone calls efficiently so we can deliver on our brand promise of responding quickly.
- Ensuring that outgoing packages and mail are consistent with our brand.
- Ordering supplies before we run low so we never run out at inopportune times.
- Managing courier/vendor relationships—because they're as important as anyone else we work with.
- Getting creative with our marketing team to come up with ideas for internal and external brand awareness, and client and employee retention.
- Depositing daily cheques and locking the safe at night.
- Booking reservations, transportation and flight bookings for clients and staff—and elevating the experience when you can.



- 
- Coordinating and supporting internal events (Chill Lounge, staff events, staff meetings) and internal communications (the Exchange). Always raising the bar in terms of experience through both of these channels.
  - Collaborating with and supporting different teams on special projects/tasks.
  - Partnering with the Compliance and Human Resources departments on tracking and monitoring initiatives (outgoing and incoming mail reviews, social media reviews, outside business activities and employee onboarding).

---

## DESIRED SKILLS AND EXPERIENCE

- Previous reception experience will be considered an asset.
- A social and friendly personality that can connect with all different kinds of people. While our clients are all of a certain ilk, they come from all backgrounds.
- A desire to raise the bar when it comes to guest experiences
- Natural creativity—we stepped outside the box with our new brand and we're looking for someone who can follow suit.
- An interest in the fundamentals of investing because everyone else around here has it.
- Organized and able to track several projects at once.
- Comfort in a high-pressure, fast-paced environment.
- Excellent attention to detail—you'd be handling client cheques, client communication documents and the CRM/reporting so there can be NO mistakes.
- Business Administration Education/Training an asset.

Reports to Karen Nguyen, Director of Marketing, and Erica Gordon, Client Experience Manager.



---

## COMPENSATION

We offer a competitive base salary and benefits plan, based on experience and the responsibilities of the position. There is also the potential to earn an annual bonus, based on the ability to meet and exceed individual, team and corporate goals.

We encourage interested applicants to review our website and explore McLean & Partners online at [www.mcleanpartners.com](http://www.mcleanpartners.com).

Applicants should send their résumé and cover letter to [humanresources@mcleanpartners.com](mailto:humanresources@mcleanpartners.com).