OPERATIONS ASSOCIATE

As part of the Operations Team, you'll support the fundamentals needed to provide a seamless client experience.

ABOUT OUR FIRM

McLean & Partners was founded in June, 1999 as a wealth management firm that focuses on client success, and our boutique approach to serving our clients beyond being just "numbers on a spreadsheet" remains unchanged. Today, McLean & Partners has a team of 26 professionals who manage over $1.3 billion in assets.

OUR CORES:

CONTINUOUSLY IMPROVE

We commit to constant learning to perpetually improve ourselves, our processes, and the results we deliver. Our "never-stop-learning" approach includes embracing both successes and bumps in the road as learning experiences.

OWN IT

We operate with unmitigated transparency and honesty, we take personal responsibility and accountability for our commitments and actions.

REFUSE TO GIVE UP

We are disciplined and resilient in our approach.

EXCEL TOGETHER

We draw collaboratively on our collective strengths to operate as an effective team.

SEEK THE TRUTH

We strive to make insightful decisions, based on a thorough understanding of the facts.

WE'RE PART OF THE CWB WEALTH MANAGEMENT TEAM

We draw on each other's breadth of experience, knowledge, and support to deliver the best solutions for our clients. CWB Wealth Management's majority ownership in McLean & Partners gives us strength in operations, and allows us to broaden our financial service offerings. We are also sub advisors of the CWB WM Onyx Mutual Funds.

YOUR ROLE

McLean & Partners vision is to be the wealth management company of choice. Our Operations Team is the backbone of our organization. While it plays a behind the scenes role, it is critical in helping our Client Service Team provide an exceptional client experience.

Your primary role is to provide the Private Client Team with accurate client-facing documentation, and to open and manage a variety of account types in a timely fashion, using several software programs.

We're looking for someone who understands the importance of managing the back end of accounts, has exceptional attention to detail, and provides the highest standards of administrative support to our Private Client Team and our clients.

The ideal applicant will be responsible for the day-to-day maintenance of all facets of client account opening and client account information. This individual will work with our Private Client Team, Compliance Team and Carrying Broker (NBIN), to ensure the information and the processing of client accounts is correct and efficiently monitored.

CRITICAL DUTIES AND RESPONSIBILITIES

- Ability to monitor changing paperwork requirements for the accurate preparation of account documentation and maintenance of client accounts.
- Supporting and working collaboratively with the Private Client Team to ensure necessary client documentation is completed and returned.
- Ensuring client information is accurate, up to date and necessary corrections are completed efficiently with little-to-no client impact.
- Attending NBIN conference calls and Webex meetings to stay up to date on changes that may impact client accounts.
- Competence using familiar and unfamiliar software programs (i.e. Saleslogix, Versapath, Open Advantage and PureFacts).
- Quickly setting up client online access.
- Preparing client mail outs with an appreciation of our brand (i.e. client welcome packages and online access packages).
- Accurately scanning & filing client account documentation.

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- Maintaining spreadsheets (i.e. tracking missing documentation and compliance client assessment).
- Troubleshooting problems – online access, client accounts (i.e. incorrect tax slips and addresses).
- Providing backup coverage for other Operations Team members.

DESIRED SKILLS AND EXPERIENCE

- Data entry experience and focus required to do this successfully.
- Strong organizational, time management and communication skills.
- Highly motivated and detail-oriented.
- Ability to work both independently, and as a team, efficiently and effectively under pressure.
- Proficient in Microsoft Word, Excel and Adobe Acrobat Pro.
- Investment industry experience is considered an asset.

Reports to Michelle Krusk, Operations Manager.

COMPENSATION

We offer a competitive base salary and benefits plan, based on industry experience and the responsibilities of the position, as well as the potential for an annual bonus based on meeting and exceeding individual, team and corporate goals.

We encourage interested applicants to review our website and explore McLean & Partners online at www.mcleanpartners.com.

Applicants should send their résumé and cover letter to humanresources@mcleanpartners.com.