Indigenous.Link

Canada’s fastest growing Indigenous career portal, Careers.Indigenous.Link is pleased to introduce a new approach to job searching for Indigenous Job Seekers of Canada. Careers.Indigenous.Link brings simplicity, value, and functionality to the world of Canadian online job boards.

Through our partnership with Indigenous.Links Diversity Recruitment Program, we post jobs for Canada’s largest corporations and government departments. With our vertical job search engine technology, Indigenous Job Seekers can search thousands of Indigenous-specific jobs in just about every industry, city, province and postal code.

Careers.Indigenous.Link offers the hottest job listings from some of the nation’s top employers, and we will continue to add services and enhance functionality ensuring a more effective job search. For example, during a search, job seekers have the ability to roll over any job listing and read a brief description of the position to determine if the job is exactly what they’re searching for. This practical feature allows job seekers to only research jobs relevant to their search. By including elements like this, Careers.Indigenous.Link can help reduce the time it takes to find and apply for the best, available jobs.

The team behind Indigenous.Link is dedicated to connecting Indigenous Peoples of Canada with great jobs along with the most time and cost-effective, career-advancing resources. It is our mission to develop and maintain a website where people can go to work!

Contact us to find out more about how to become a Site Sponsor.

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Job Board Posting

Date Printed: 2024/07/01

Careers.Indigenous.Link

Portfolio Administrator, Private Investment Counsel (PIC) - Langley

Job ID	**200701-en_US-9305**	
Web Address	https://careers.indigenous.link/viewjob?jobname=200701-en_US-9305	
Company	Scotiabank	
Location	Langley, BC	
Date Posted	From: 2024-06-24	To: 2050-01-01
Job	Type: Full-time	Category: Finance

Description

Requisition ID: 200701

Join a purpose driven winning team, committed to results, in an inclusive and high-performing culture.Purpose of Job:To work closely with the Relationship Managers in the management of the overall book of business by providing effective and efficient client service and in the execution of business development related activities. The role is a dedicated client servicing support role, designed to create capacity and support the Relationship Managers to focus on value-added client activities.Additionally, the Portfolio Administrator will support and deliver upon the market and regional goals of operational excellence through ongoing review and enhancement of processes, practices and execution methods.The Portfolio Administrator understands how the Bank’s risk appetite and risk culture should be considered in day-to-day activities and decisions, ensuring that all activities conducted are in compliance with governing regulations, internal policies and procedures.Major Accountabilities:Client Service

- Strong understanding of PIC value proposition for Consistent delivery of the desired client experience during all client interactions
- Key point of contact for clients on behalf of assigned Relationship Manager
- Responding to client inquiries in a timely, responsive and professional manner, including executing on client cash management requests
- Escalating issues to the Relationship Managers and or Governance & Operations Manager as appropriate
- Preparing routine client correspondence and ad-hoc, customized client reporting
- Actively supporting the implementation of client wealth strategies through detailed and accurate management of portfolio administration tasks and activities
- Quality, timely and effective management of account opening process
- Coordinating and managing the end to end client onboarding processes with respect to operational and administrative processes
- Preparing for client annual reviews
- Maintaining accurate client information and files in electronic or paper format as may be required
- Reviewing processes and providing recommendations to improve the client experience, add value and enhance efficiencies through implementation of best practices and ongoing process reengineering
- Following up with clients on missing or incomplete documentation
- Using strong knowledge of the Bank’s, Scotia Wealth and Private Investment Counsel diverse products and services, to ensure the client’s needs are well understood, documented and satisfied
- Partnering with all internal product/service business partners, as required ensuring client needs are met
- Actively listening and seeking client feedback on products, services and the delivery of client experience for purposes of client service and opportunity identification
- Consistently executing on Scotia Wealth and PIC service standards through proactive contact, central client point of contact, recording and maintaining the Client Contact database
- Responding to client and Senior Management inquiries
- Resolving client issues expeditiously and accurately and/or escalating problem situations when appropriate
- Proactively identifying and implementing strategies to address client needs

Support Relationship Managers
- Preparing, creating and customizing of client reports
- Working with Trust Officers to ensure that all investment strategies and principals are applied appropriately
- Supporting Relationship Managers to execute upon business planning activities and events
- Providing Portfolio Administration support functions as required for Estate & Trust portfolios and/or direction to Portfolio Administrators.
- Ensuring a comprehensive understanding of each client’s financial needs, risk tolerance, and long-term objectives by maintaining ongoing dialogue
- staying abreast of any changes in client lifestyle / needs or capital market conditions that may affect clients’ financial objectives
- Accurate management of client information and data through use and knowledge of applicable systems
- Demonstrate strong organizational skills and attention to detail in order to successfully support the team and relationship managers

Business Development
- Coordinating prospecting and business development activities on behalf of the Relationship Managers
- Supporting the execution of marketing strategies to attract and retain valuable clients i.e. coordinating internal/external professional presentations and reports
- Coordinating interactions between clients / prospects and the Relationship Managers and Team of Experts or other Scotiabank Partners
- Liaising with internal referral sources to ensure timely communication, response and resolution to inquiries and relationship management needs
- Preparing materials for business development meetings
- Following up on action items from business development meetings
- Identifying referral opportunities to Scotia Wealth partners, ScotiaMcLeod, Commercial Banking, Retail and other key partners

Risk Management/Compliance
- Minimizing the Bank’s exposure to risk by maintaining awareness and ensuring compliance/adherence to all procedures, regulatory activities and guidelines including Privacy, Anti-Money Laundering, Anti-Terrorist Financing, FCAC, Know your Client, Occupational Health & Safety and Guidelines for Business Conduct
- Supporting the Relationship Managers in maintaining client portfolios in accordance with established firm strategy which includes, utilizing the Central Portfolio Models and pools, focusing on client segmentation and client’s risk appetite
- Participating in all aspects of compliance and the identification of actions or changes in policy and/or procedures in order to remediate non-compliance in the business.
- Adhering to bank and firm standards, policies and business practices to ensure that Private Investment Counsel is meeting the appropriate regulatory and compliance requirements as they relate to both new and existing accounts
- Escalating, documenting and reporting any unusual occurrences, suspicious or fraudulent activities, as per established procedures

Team Membership
- Contributing to the effective functioning of the Private Investment Counsel team
- Fostering and developing a strong, positive team environment, driving employee empowerment, innovation and a high degree of engagement
- Building effective working relationships across the team and with various business line, internal and external stakeholders
- Maintaining a high level of client service
- Facilitating a culture of open and honest communication
- Actively participating and contributing to coaching sessions, touchbases and team meetings
- Encouraging the generation of new ideas and approaches
- Actively sharing knowledge and experience to enhance the development of all team members
- Developing and executing a meaningful employee development plan.

Education/Work Experience/Designations
- University Degree (Business, Economics, Accounting, Finance), College Diploma or equivalent
- CSC, industry experience and/or Investment management knowledge is an asset

- Two years industry experience
- Strong relationship management skills
- Proficient in providing support to sales and business development activities
- Strong interpersonal, communication & listening skills
- Results/Goal achievement oriented
- Self- motivated and disciplined
- Executes with Integrity
- Proficient in the completion of a Financial Plan
- Thorough knowledge of each Scotia Wealth & PIC Business Line’s value proposition and product and service offering in order to identify opportunities across the Scotia Wealth partners
- Working knowledge of the products and services offered by Scotiabank partners in order to identify and refer clients as appropriate.

** Please note this is a 12 month - full time/contract opportunity.Location(s): Canada : British Columbia : Langley

Scotiabank is a leading bank in the Americas. Guided by our purpose: "for every future", we help our customers, their families and their communities achieve success through a broad range of advice, products and services, including personal and commercial banking, wealth management and private banking, corporate and investment banking, and capital markets.

At Scotiabank, we value the unique skills and experiences each individual brings to the Bank, and are committed to creating and maintaining an inclusive and accessible environment for everyone. If you require accommodation (including, but not limited to, an accessible interview site, alternate format documents, ASL Interpreter, or Assistive Technology) during the recruitment and selection process, please let our Recruitment team know. If you require technical assistance, please click here. Candidates must apply directly online to be considered for this role. We thank all applicants for their interest in a career at Scotiabank; however, only those candidates who are selected for an interview will be contacted.

For more information, visit Scotiabank for Portfolio Administrator, Private Investment Counsel (PIC) - Langley