Team Lead, Registered Accounts – Vancouver

FIRM OVERVIEW

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant culture that we have built and sustained for many years. These values are the cornerstone of our culture and the principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers and every other variety of person you can imagine. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. A recipient of a Canada's Volunteer Award from the Government of Canada, we are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

We have an opportunity for a Team Lead, Registered Accounts to join our award-winning firm in the Vancouver office.

We are seeking an experienced subject-matter expert with strong knowledge of registered products and client account processing. Reporting to the Supervisor, Registered Accounts, the ideal candidate is committed to client service excellence, detail-oriented and driven to provide exemplary support to advisory groups in a fast-paced environment. This role requires a critical thinker and skillful decision maker, who can quickly adapt in a continuously changing regulatory environment.

RESPONSIBILITIES

- Guide Registered Accounts team members on client account activities related to registered products (RRSP, RESP, RRIF, RDSP, TFSA and FHSAs)
- Ensure standard operating procedures and updates are followed, and service level agreements are met
- Process Registered Accounts tax reporting
- Provide expert advice in Registered Accounts processes and best practices to Advisors and their advisory support teams
- Deliver client service excellence by responding to inquiries accurately and in a timely manner
- Participate in departmental training of new and existing Client Services and Retail team members
- Partner with advisory teams, Compliance, New Accounts, Estate and Trust, Accounts Transfers and Accounting departments to remain current on new developments and anticipate impacts to existing processes; execute changes as required
- Contribute to and lead continuous improvement initiatives related to best practices, operational efficiency and service levels
- Engage in ongoing learning and professional development to increase knowledge as a subject-matter expert

KNOWLEDGE AND EXPERIENCE

- Minimum 2-3 years of investment industry experience in Registered Accounts, with extensive knowledge of various registered plan types and processes
- People leadership experience is a strong asset
- Self-starter and continuous learner with the capacity to work independently, along with flexibility and willingness to assist others
- Critical thinker and skillful decision maker, adaptable in a changing regulatory environment
- Excellent organizational skills, able to prioritize important and time-sensitive tasks
- Ability to work efficiently and accurately in a fast-paced, dynamic environment, with a sharp eye for detail
- Strong verbal and written communication and presentation skills
- Experience with the Broadridge Dataphile platform or similar bookkeeping system
- Proficiency in MS Office (Word, Excel and Outlook)
- Completion of securities and investment industry-related courses is an asset

At 100 years young, our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this role, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **April 12, 2023**.

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.