



Operations Services Administrator III (RESP)

We're Investors Group – a Canadian leader in providing personal financial planning services, and dedicated to building lasting client relationships. This is your opportunity to build a career with a leading organization where you can learn, grow and thrive both professionally and personally.

Our vision is to improve our clients' financial well-being.

At Investors Group:

- We relate to our diverse clients through **comprehensive planning**
- In all of our endeavours we are **diligent in our efforts**
- We respect each other and the communities we serve by being **people who care**

If you share our vision and values, we'd like to hear from you.

The Operations Services team provides a combination of support for multiple lines of business and provides administrative processing and servicing support to Investors Group Clients, Consultant Network and Regional Offices.

The Processing Administrator, RESP main responsibility is to process deposits, redemptions, internal transfers and pre-authorized contributions requests for clients with RESP accounts. The individual within this role will be expected to maintain a high level of accuracy, timeliness and accountability. In addition, this position manages error correction as it relates to error reports, processing, and region office quality control.

Responsibilities include:

- Accurate online entry of deposits, internal transfers, redemptions, systematic and daily transaction reporting including reconstructing RESP accounts using capital, income and Grant values
- Review client documentation and ensure all mandatory requirements have been submitted; initiate appropriate action on missing requirements in order to complete client requests
- Achieve and maintain the business unit's quality, productivity standards and departmental service levels
- Maintain a working relationship with external financial institutions and vendors in order to facilitate internal and external client transfers with no errors or delays
- Remain current on product knowledge to ensure consistency in processing based on Investors Group policies, HRSDC and CRA requirements and Advanced Financial Planning communication

Qualifications:

- A minimum of 1 year experience in a financial services environment (preferably with RESP experience)
- Proficient PC skills/experience using Windows, Word, Excel and Microsoft Access
- Proven analytical, problem solving and decision making skills
- Strong oral and written communication skills
- Ability to multi-task and adapt to frequently changing priorities

Additional Information:

To apply for this position, send a cover letter and resume, indicating the position title, to: resumes@investorsgroup.com. Deadline for applications is November 20, 2015.

We thank all applicants, however, only those under consideration will be contacted.