



coleford

Investment Management

Job Opportunity - CLIENT SERVICES COORDINATOR

Position Summary

Provides support to the Managing Directors in the key areas of client service and marketing administration. Key position responsibilities include:

- ❑ Client Service
- ❑ New Client Account Process
- ❑ Office Administration
- ❑ Marketing Support
- ❑ Reception
- ❑ Reporting & Tracking of Information
- ❑ Back-up to Administrative Officer

Position Requirements

- ❑ College/university degree in a related field of study (administration, marketing, business, finance)
- ❑ 3 - 5 years experience in an administrative role preferred (however, will consider recent grad with part-time, temporary, summer, co-op or volunteer employment)
- ❑ Client service skills and/or strong client service orientation
- ❑ Strong verbal & written communication skills
- ❑ Intermediate skill level in Microsoft Office - Word, Excel, PowerPoint
- ❑ Attention to detail; high quality standards
- ❑ Professional manner (telephone, in-person)
- ❑ Enjoy working with numbers/math/finance
- ❑ Experience and/or interest in the financial investment industry; completion of the Canadian Securities course an asset

The Organization

Coleford Investment Management Ltd. is an independent, private wealth management firm, based in downtown Toronto, serving the special investment needs of high net worth Canadians and charitable foundations.

Compensation Package

Includes competitive salary & employee benefit program.

Career Development

The organization offers security of employment, a pleasant and professional work environment, and the opportunity to work closely with the Managing Directors in supporting the current client base and attracting new clients to the firm.

Interested candidates are asked to call and/or submit their resume via email to:

Faye Wales, **People Time**, Burlington, ON

Email: fwales@peopletime.ca

Telephone: 905-639-8148