Quadrant
ASSET MANAGEMENT

Service Team Associate

Who is Quadrant Asset Management?

Quadrant Asset Management is an owner-managed boutique investment counsel/portfolio management firm that services families and institutions. The principals and senior advisors at Quadrant consist of professionals that provide unique and appropriate investment and wealth management solutions to meet clients' needs and objectives. Quadrant is a client centric firm where the needs of our clients is the focus of all our business decisions, operations and ideas.

Job Summary:

The Service Team Associate has significant impact on the client experience and is responsible for a variety of duties which include client meeting preparation, transaction processing, interacting with clients, providing office support and working closely with our Managing Director, Portfolio Manager.

The Service Team Associate is also responsible for the preparation of client account opening documentation, drafting client correspondence as needed, processing client cheques and related paperwork, completing transactional requests and directing documentation to our custodian.

Core Competencies:

The ideal candidate will be positive, efficient and have an ability to work well under pressure. Commitment to customer service delivered in a personable manner is required to ensure strong client relationships are built and client confidence is gained.

At Quadrant Asset Management our mission is to serve our clients with an exceptional combination of knowledge, expertise and dedication to deliver a superior customer experience. To achieve this all team members embody our core competencies:

- ✓ Team player
- ✓ Service driven
- ✓ Proactive solution seeker
- ✓ Positive collaborative nature

Essential Duties and Responsibilities:

- Support the Managing Director, Portfolio Manager's sales and service objectives by delivering service initiatives to clients which include, but are not limited to, review of reports, follow-up on client inquiries and requests to ensure appropriate account maintenance, preparing and editing reports, proposals, marketing materials, and other communications
- Scheduling client meetings and preparing client meeting packages
- Liaise with various departments for execution of client requests
- Project a professional and consistent image by adhering to organization's mission and vision statement

Qualifications:

- Excellent knowledge of financial services operations as well as policies and procedures.
- Proactively and professionally provide assistance to Portfolio Manager
- Knowledge of compliance rules (proprietary and industry)
- Minimum 3 years investment experience
- CSC and/or IFIC operations course an asset
- Solid understanding of investment products
- Skillful knowledge working with software and system technology such as Microsoft Word, Excel, Adobe as well as internal CRM programs etc.
- Exceptional attention to detail and organization
- Strong communication skills both verbal and written
- Proven ability to prioritize multiple assignments appropriately
- Proven ability to maintain strict confidentiality of information

Send your cover letter (including salary expectations) to Brenda Nolin @ BNolin@QuadAsset.com with the words "Service Team Associate" in the subject line. Only those selected for an interview will be contacted.