PARK PLACE
FINANCIAL

POSITION TITLE: **Executive Assistant**

REPORTING TO: **Client Experience Manager and Chief Compliance Officer**

DATE LAST REVISED: **October 4, 2021**

Park Place Financial is looking to grow our team with people who have a passion for excellence and apply a high ethical standard in their work. Prioritizing the client first, we ensure that strong, positive processes are in place to create and preserve wealth across family generations.

GENERAL ACCOUNTABILITY

The Executive Assistant (EA) is responsible for developing, tracking and implementing efficient processes that support the offering of Park Place Financial for entrepreneurs and family business owners. The EA will play an integral role to ensure an active and engaged calendar of activities for the Partner and will contribute to administrative processes to ensure outstanding client experience.

MAIN RESPONSIBILITIES

- Coordinate and drive the calendar of Partner(s) to achieve their annual goals and objectives.
- Track and organize client follow-ups and planning cases to ensure Partner(s) keep to timelines and have follow-ups completed; ensure client deliverables are well prepared and to a standard which ensures great experiences for our clients.
- Be the primary point of contact for the Partner(s) clients and ensure excellent client experience with every interaction
- Be pro-active in managing the client relationship by suggesting client touch points for the advisor and ensuring our client experience is delivered to every client
- Liaise with the team to ensure Partner(s) are prepared in advance with all materials for meetings, speaking engagements and events to ensure the best brand experience with every engagement.
- Maintain and optimize the office environment for the Partner(s) including filing, organization and high-quality preparation for all engagements including travel bookings.
- Manage, optimize and enter information into the Park Place Customer Relationship Management tool
- Assist with the processing of client applications for insurance and financial products.
- Work with the Compliance Officer to ensure that all file preparations and agendas for client meetings are compliant with applicable regulations.

- Work with the Marketing team to coordinate client lists and ensure Partner(s) are prepped well in advance for corporate events including presentations.
- Based on your interactions with clients, make recommendations on advisor-lead marketing activities including written articles, events and presentation topics that may be attractive to clients.
- Work with the Executive team to implement and track key projects where requested.
- Contribute to operational processes to ensure continuous improvement in the quality of our client engagements.
- Recognize and act on opportunities to request a testimonial from our current clients.
- Contribute to the overall cleanliness and order of the shared file room areas, staff rooms etc.
- Ensure the Partner’s office is clean, files are put away and manage a daily in, out and work in progress box, ensuring work-in-progress is followed up on.
- Other duties as assigned.

WORKING RELATIONSHIPS

Partners/Executive Team: Continuous interaction to assist, schedule and prepare needed resources.
Customers/Clients: Continuous interaction to contribute to assist, advise, guide and resolve questions, concerns and complaints.

SKILLS AND COMPETENCIES

- Strong interpersonal skills with a proven ability to attract, build and establish strong relationships with our clients, stakeholders, and members of the team
- Demonstrated ability to set and achieve strategically important goals
- High energy, positive, organized and excited about the work that we do for our clients
- Impeccable and thoughtful time manager
- Exercise good judgment, discretion and confidentiality in all communications
- Strong ability to plan in advance and anticipate client needs
- A team player and an effective independent time manager
- Strong relationship building both online and offline, so clients, partners and stakeholders feel confident communicating directly with you to achieve their goals
- Spirit of continuous learning and growth
- A positive attitude and ability to take the initiative to help others and ensure a great environment for all staff and clients
- Strong attention to detail that creates great experiences for our clients.

KNOWLEDGE, TRAINING AND QUALIFICATIONS

- Post-secondary degree or diploma preferred in Business Administration or a related field or combination of education and experience.
- Family business or entrepreneurship knowledge or background an asset.
- Minimum of five (5) years experience in a high performing administrative role.
- Minimum of three (3) years of Executive support preferred.
- Canadian Securities Course completion or mutual fund licensing and/or Life License an asset.
- Experience with processing and tracking life insurance applications including tracking the underwriting process a strong asset.
- Proficient in Microsoft 365 Online / Outlook.
- Demonstrated ability to work under pressure and meet tight deadlines.
- Volunteer and community involvement an asset.
- Experience using Act, Salesforce or a client relationship management system an asset.

WORKING CONDITIONS

Physical Effort: Majority of time is spent in a comfortable position and most activities require a variety of easy muscle movements. Sustained keyboarding with a required ability to sit for extended periods of time.

Physical Environment: Environment has only occasional exposure to mild unpleasant or disagreeable conditions with remote possibility of accident or health hazards. Occasional travel for business and client meetings required. Occasional work on evenings or weekends for special events and community engagements.

Sensory Attention: Work activities involve need to concentrate for intermediate durations and close attention several times daily. Excellent reading comprehension of printed and electronic text required.
Mental Stress: Fast-paced work environment with occasional exposure to one or more mental pressures (e.g. deadlines, needs for accurate, potentially difficult clients or situations).

Please note: The above statement reflects the general details considered necessary to describe the principal functions of the job identified and shall not be considered as a conclusive description of all work required in the position. This job description may be subject to change in order to meet organizational, client or operational requirements.

REVIEWED BY:

______________________________	______________________________
Name and Signature	**Supervisor's Name and Signature**
Date:	**Date:**