

Senior Customer Service & Sales Associate

Job type: Permanent

Location: Oakville

Region: Ontario

The Senior Customer Service & Sales Associate will work closely with members of Harvest's distribution system in developing client relationships with Investment Advisors. Responsibilities will include working on specific products during marketing campaigns, customer servicing of existing products, taking incoming calls, project management and maintaining daily reporting on sales. The position will also be responsible for providing administrative support to back office matters and various administrative duties.

Position Duties:

- Respond and service of client inquiries for product information and assistance.
- Communicate client satisfaction or issues to Management and Sales Directors.
- Contact and provide product information to IROC advisors in coordination with the Sales Directors.
- Working and educate back office customer service with up to date Mutual Fund information.
- Assist and execute in marketing and sales practice procedure in accordance with compliance rules.
- Project management, efficient and organized work flow when products are being launched and marketing campaigns are being implemented.
- Collect MFDA information to populate the database and correspond with the respective Sales Director on the regional development.
- Maintaining sales reports.
- Work with Sales Directors regarding their business plans, in coordinating follow up and information flow to the various sales channels.
- Assisting with scheduling meetings for the Sales Directors during Product campaigns
- Monitor the success rate of sales efforts in each region, providing a weekly report of new sales and secondary sales in the various regions.

Requirements:

- Post-secondary education preferred.
- Minimum 2 years of working in the financial services industry.
- Detail oriented and organized ability to work on spreadsheets and data management system.

Contact: resumes@harvestportfolios.com