



<https://intscanada.com/job/investment-coordinator/>

Investment Coordinator

Description

Investment Coordinator

BMO Bank

Remote

Overview:

As an Investment Coordinator at BMO Bank you will join their Wealth Management team for a seasonal ramp up project. You will provide end to end support for BMO mutual funds, ETFs, segregated funds, term investments, and savings products for internal and external stakeholders. You will also deliver operational processes and provides after-sales support to the personal wealth and asset management businesses and stakeholders. Areas of operational expertise include Broker/Dealer and Private Bank support, Asset Management, Investment Funds, and Life Insurance.

Job Duties:

- Provides advice and guidance to assigned business/group on implementation of solutions.
- Supports the execution of strategic initiatives in collaboration with internal and external stakeholders.
- Communicates with internal business partners and external customers in response to standard and non-standard inquiries.
- Monitors and tracks performance, and addresses any issues.
- Breaks down strategic problems, and analyses data and information to provide insights and recommendation.
- Gathers and formats data into regular and ad-hoc reports, and dashboards.
- Supports change management of varying scope and type; tasks typically focused on execution and sustainment activities.
- Executes work to deliver timely, accurate, and efficient service
- Resolves standard and relatively straightforward issues, referring non-routine issues to more senior team members and/or manager.
- May function as a problem-solving resource for more junior staff.
- Provides input and analysis into the continuous improvement of business processes and procedures and participates in the planning, testing, and implementation of projects and new / revised products, services, or processes.
- Provides accurate and timely processing of transactions, activities, services, etc. to respond to stakeholder requests in compliance with regulatory and risk controls.
- Provides accurate, consistent, and knowledgeable responses to internal/external stakeholder questions and requests.
- Follows documented policies and procedures to execute day-to-day transactions, activities, processes and meet all Service Level Agreements (SLAs).

Hiring organization

INTS Consulting

Date posted

2023-09-05

- Checks and reconciles information and documentation to ensure accuracy and completeness.
- Analyzes data and information to provide insights and recommendations.
- Identifies and analyzes issues and problems and resolves in a timely manner or escalates as required.
- Communicates and collaborates with internal and external stakeholders to deliver on business objectives.
- Develops and maintains effective relationships with internal and external stakeholders to execute work and fulfill service delivery expectations.
- Develops and maintains an understanding of the regulatory requirements and risks inherent in the operations to take appropriate actions and maintain operational integrity.
- Collaborates in the development / implementation of new processes/systems and changes / improvements to existing systems and processes.
- Supports the development of tools and delivery of training focused on delivering business results.
- Focus may be on a business/group.
- Thinks creatively and proposes new solutions.
- Exercises judgment to identify, diagnose, and solve problems within given rules.
- Works mostly independently.
- Broader work or accountabilities may be assigned as needed.

Qualifications:

- Typically, between 3 – 5 years of relevant experience and post-secondary degree in related field of study or an equivalent combination of education and experience.
- Knowledge and experience using relevant systems and technology – In-depth.
- Knowledge and understanding of the business unit’s key products and services, processes, and controls – In-depth.
- Knowledge of the risk and regulatory requirements of the business – In-depth.
- Prioritization skills – Good.
- Customer service skills – In-depth.
- PC skills (MS Word, Excel, PowerPoint) – In-depth.
- Specialized knowledge from education and/or business experience.
- Verbal & written communication skills – In-depth.
- Collaboration & team skills – In-depth.
- Analytical and problem-solving skills – In-depth.
- Influence skills – In-depth.

Job Types: Full-time, Fixed term contract, Seasonal
 Contract length: 6 months

Pay: \$16.00-\$19.00 per hour

Schedule:

- 8 hour shift
- Day shift
- Monday to Friday
- No weekends

Education:

- Bachelor's Degree (preferred)

Expected start date: 2022-10-03