Position Description

Job Title: Office Support Specialist

Location: Open

Reporting to: Diana Di Renzo, Manager, HR & Back Office Services

Date: September 2021

Qualified Financial Services is a rapidly growing, full-service Managing General Agency specializing in Life Insurance and Wealth Management products. Our head office is located in Toronto and we have additional offices in Markham, Barrie, Kingston, Ottawa, Montreal, Saint John and Halifax and we continue to grow! We are committed to providing the best support possible to our Advisors and pride ourselves as being innovative, passionate industry leaders in this regard. We offer a flexible, positive and rewarding place to work with considerable opportunity for career advancement. For more information on our Company please visit www.qfscanada.com. The current opportunity we have available is for a senior administrative assistant in any of our office locations.

Position Summary:

As the office support specialist, you will hold a diverse range of responsibilities and no two days will be alike. You have a strong ability to be flexible and adapt to constantly changing day-to-day tasks. You thrive in an environment that provides variety and challenging work, always keeping you engaged.

Your interpersonal skills make it easy for you to create a lasting and great customer service experience to all visitors of the office. You deliver on our vision through inspired interactions. You are adept at working effectively with a wide variety of peers and leaders, providing administrative support across the organization.

The ideal individual will have above average time management skills and the ability to prioritize and re-prioritize as new tasks are received and interruptions occur. You're not afraid to ask for help in prioritizing tasks as needed to ensure you're focused on the right activities. Talented at working under pressure with multiple tasks on the go, shifting timelines and priorities, the ability to remain calm in stressful situations and to partner effectively with peers is critical. You keep smiling and nothing gets you down!

In addition to front desk reception, this role will initially support the back-office leaders in order to cover a maternity leave. The role will transition into a support role for various administrative departments in the organization, in addition to maintaining the front desk reception responsibilities.

Responsibilities:

Reception (Standard, long-term duties):

- Warmly greet and welcome office visitors and assist them appropriately

- Respond to all incoming calls in a timely, friendly, and professional manner and accurately redirect calls and relay messages as necessary
- Promptly open and distribute all incoming mail both internally and externally, and prepare all outgoing mail on a daily basis
- Manage the office meeting rooms including scheduling, maintaining tidiness, and ensuring there are no scheduling conflicts
- Perform other miscellaneous duties such as photocopying, scanning, faxing and ordering of supplies as required
- Special projects requested by the leadership team from time to time

Office Support (Temporary duties):

- Work behind-the-scenes in order to ensure the smooth flow of the leaders' activities and support the demands of a high-energy leadership team.
- Ability to adapt to constantly changing day-to-day tasks
- Effective at being resourceful in order to independently problem solve
- Liaise with individuals and groups inside and outside of the company on behalf of the leadership team
- Organize team and department meetings – both online and in-person
- Efficiently coordinate changes in department processes and procedures
- Assist with various projects assigned from time to time

Job Transition:
Office Support (Standard duties):

- Accurately add and maintain advisor contracting, licensing & E&O information on company's internal system
- Administer and thoroughly review background checks on all new advisors
- Extract commission statements from various insurance partner websites, adhering to strict deadlines
- Research advisor debt and ascertain next steps before communicating the debt notification to advisors

Experience and behaviours required:

- Bilingual; French and English
- Ability to stay calm and friendly under pressure
- Ability to adapt to new situations and change direction quickly as needed
- Strong communication skills; the ability to think ahead and proact vs only react
- Not afraid to ask for help when required
- Previous administration experience
- Very strong organizational skills
- Confident and enthusiastic about being in a support role
- Polished and professional
- Pay close attention to detail, ensuring all documentation, spelling, grammar and other information is accurate
- Strong listening and processing skills; able to stay focused and "in the moment"
- Excellent follow-up skills