JOB TITLE: **Licensed Associate**
BRANCH NAME: Assante Capital Management Ltd.
BRANCH LOCATION: Toronto, Ontario
POSTING DATE: October 8, 2025
APPLICATION DEADLINE: November 8, 2025
HOURS PER WEEK: 37.5
CONTACT: atalman@assante.com

JOB DESCRIPTION:

We are currently hiring a full time Licensed Associate to provide professional and specialized administrative services and support, as well as play an active role in the practice. This highly motivated individual will be responsible for financial administrative and customer service support, to an independent Senior Financial Planning Advisor.

EXPERIENCE AND QUALIFICATIONS:

- University or College degree, CSC, CFP/QAFP (or working toward) all required. Insurance licensed preferred (or willing to obtain).
- Minimum 3 years of prior experience in a similar role at a financial services firm. Preference given to experience assisting a financial planner.
- Spotless compliance record.
- Excellent verbal and interpersonal skills.
- Strong writing skills. Ability to create concise, clear and grammatically correct correspondence.
- Must have strong mathematical aptitude and a keen eye for accuracy and exceptional attention to detail.
- Very good working knowledge of Excel and Word and have had experience with related industry systems.
- Exceptional administrative, time management and problem-solving skills.
- Ability to operate independently with minimal supervision.
- Proven self starter who takes initiative and works with integrity.
- Professional, well presented, with a strong customer service focus.

DUTIES AND RESPONSIBILITIES:

- Supporting the coordination and organization of investment and insurance-related documentation.
- Inputting trades and managing a diligent follow up system for all processing and client enquiries.
- Establishing and maintaining meticulous electronic client files.
- Report preparation and research for client meetings.
- Research and resolve processing and customer service enquiries.
- Ensuring Firm compliance standards are upheld and met.
- Prepare client deliverables and meeting materials, ensuring a high level of attention to detail.
- Overseeing all incoming communications and internal correspondence.
- Act as a representative and liaison for the Financial Advisor.
- Participate in investment committee meetings and research new investment options for client portfolios.
- Building strong client relationships.

ADDITIONAL NOTES:

This is a full-time, in-person role with limited opportunity for remote work. The hours are 8:30 am – 5:00 pm (Monday – Friday) with occasional, additional hours expected during busy periods. Benefits and continuing education opportunities are available.

If you see yourself as an energetic, detailed and organized professional, with a customer care focus and take-charge attitude, we welcome you to submit your resume.

Please apply with your current resume and a cover letter to**:** atalman@assante.com

We thank all applicants but only those selected for an interview will be contacted.