

Financial Sales and Marketing Assistant

Exciting Opportunity to Join a Financial Industry Leader!

Our client, a leading wealth management firm, is searching for a confident Sales and Marketing Assistant to join one of their renowned and top producing advisor teams. This role directly supports the success and growth of the Investment Advisor by managing client information, monitoring transfers, preparing required documentation in line with compliance requirements and maintaining an effective and efficient work environment.

The Sales and Marketing Assistant will also be responsible for all marketing efforts including outgoing client communication, liaising with the corporate marketing team, and organizing events. A demonstrated ability to build rapport and strong client relationships is essential. The successful candidate will create a client focused experience with strong verbal and written communication skills that capture the professional presence, and engaging culture of our client's organization.

Candidate Requirements:

- A background in the financial industry is required
- Previous marketing and event planning experience
- Superior communication, attention to detail and administrative skills
- Must have strong numeric aptitude (financial math)
- Relevant post-secondary education in areas such as Marketing or Finance are considered an asset
- Licensed or pursuing licensing as an Investment Representative (IR) is not required but considered an asset

Are you ready to join a dynamic, professional, and engaging culture? [Let's talk.](#)

To apply for this exciting opportunity, please email your resume to apply@acuityhr.ca. We thank all candidates for their interest; however only those selected for further consideration will be contacted.

For more information about Acuity HR visit our website: www.acuityhr.ca or follow us on LinkedIn.