



JOB TITLE: Senior Manager, Transition Services
DEPARTMENT: Administration, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Director, Transitions, New Accounts and Registered Products
LOCATION: Markham, ON

JOB STATEMENT:

Reporting to the Director, Transitions Services, New Accounts & Registered Products, and working in a fast-paced environment, the Senior Manager, Transitions Services is responsible for the oversight of transition and client implementation activities. The ideal candidate will collaborate with all stakeholders and lead all customized transition activities for individual and corporate clients, and promote the organization’s cultural focus on an elevated client-centric servicing proposition.

ESSENTIAL FUNCTIONS, ATTRIBUTES & ABILITIES:

- Assisting national Partnerships & Business Development team in transitioning Financial Advisors and Corporate Clients to WWM; working in collaboration with the partner-facing RRM dedicated to each transition;
- Acting as the Primary Liaison with internal teams in the coordination of operational readiness, onboarding issues, risk management and ongoing reporting to senior executives;
- Assisting with data analysis for the preparation of transitioning data and / or documents, and ensuring timely completion of transitional activities;
- Identifying, managing and communicating risks associated to onboarding activities and timelines;
- Providing recommendations on updates to WWM’s policies and procedures manual, portal and systems with a focus on the client experience;
- Ensuring inter-departmental communications are prepared, vetted and disseminated for each transition;
- Responding to all inquiries and escalated issues with a focus on building, reinforcing and enhancing the business and relationships, while ensuring appropriate controls are maintained; ensuring unresolved daily and high-risk items are followed through to resolution in a timely and expedited fashion;
- Leading and coaching the team, sharing ideas and success with colleagues and peers, and taking ownership of personal and team development and training;
- Working closely with other members of the Management team, supporting department and operations initiatives;
- Developing and building strong productive working relationships with external and internal stakeholders;
- Leading and participating in executive level business and technology discussions, with demonstrated success at collaborating, building consensus, and driving multiple implementations to completion; and
- Assisting with projects, day-to-day functions, and performing other duties as assigned.

JOB SPECIFICATIONS:

- Post-secondary education

- Minimum of 5 – 8 years investment industry experience, project management, client service and experience in back office and branch environment administration
- Knowledge of the Dataphile, ISM, FundSERV and Microsoft Office an asset
- Excellent supervisory, communication and organizational skills
- Excellent attention to detail and problem-solving skills
- Strong customer focus, service orientation and professional acumen
- Excellent understanding of risk management, best practices and industry issues
- Analytical, well organized and ability to multi-task; proactive, and takes initiative
- Ability and experience to assess current and / or proposed processes
- Ability to work independently as well as in a team environment

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@worldsourcewealth.com.

Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.

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

