



Capstone Asset Management is a Portfolio Manager, Investment Fund Manager and Exempt Market Dealer active in British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Quebec, Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland and Labrador.

Striving to hold to Biblically informed values, we provide full discretionary investment management and individual investment mandates to high net worth individuals and families, institutions, pensions, foundations, and family offices. We are a boutique firm with over \$800 million in assets under management.

Title: Receptionist/Administrative Assistant
Reporting to: Maria Dawes & Janet Kim Sing
Department: Private Wealth Team
Location: In person at our offices in Langley, BC

Summary of Position:

Capstone Asset Management seeks a Receptionist/Administrative Assistant who will provide general back office support while working closely with other team members. The successful applicant will be a self-starter, organized, and a team player who aligns with our philosophical values. This is a 6-month in-office, contract position at 40 hours per week with the possibility of extending.

Duties & Responsibilities:

- Sit at reception and greet all visitors
- Answer phones and voicemails including managing office phone settings when required
- Set up boardrooms and meeting spaces, following our client experience expectations
- Tidy and maintain the common areas in the morning (including the kitchen and reception area)
- Assist in preparing and processing client paperwork related to investment accounts
- Produce a variety of reports and statements as requested
- Assist in collation and distribution of reports
- Complete miscellaneous administrative tasks & projects as required
- Liaison with our back-office custodian and other administrative professionals as required



Qualifications & Experience:

- Proficiency in MS Office including Word, Excel and Outlook
- Clarity in written and verbal communications
- Pleasant telephone manner
- Ability to multi-task while remaining organized
- Strong attention to detail
- Minimum of 2 years administrative experience preferably with a financial institution
- Ability to learn various software resources for report generation and other tasks

Required Competencies:

- Business Acumen
- Information Gathering & Processing
- Information Management
- Planning & Organization
- Policy & Procedure Knowledge
- Project Management

Please forward your resume and cover letter in confidence to: careers@capstoneassets.ca

Capstone Asset Management thanks you for your interest; however, only candidates selected for an interview will be contacted.

