

PriceMetrix focuses exclusively on improving the overall business of investment firms by helping individual financial advisors to become better 'CEOs' of their business. *PriceMetrix Value Program* is a patented combination of personalized intelligence reports, practice management tools, and expert services designed solely to enable advisors and managers, at all levels, to proactively identify and close client, product and pricing opportunities.

PriceMetrix customers typically realize increases in assets, revenue and fee-based advisory business, as well as, improvements in household quality and pricing.

Founded in 2000, PriceMetrix has its principal place of business in Toronto, Ontario, and services a broad range of clients within Canada and the United States.

Client Associate

Position Profile

As the primary point of contact for all operational matters within their client teams, the Client Associate will be accountable for managing and monitoring a broad range of tasks and responsibilities in four main areas: (i) operational activities; (ii) client support desk; (iii) outbound client initiatives; and (iv) client team support.

Based in Toronto and reporting to the Director, Client Program Delivery, the successful candidate can expect to support multiple client teams and work closely with other members of the Client Services team to ensure the smooth delivery of our Program to our clients. The role of the Client Associate is hands-on, client facing, and service-oriented.

The Client Associate will be accountable for the following areas within their client teams:

- Responding to incoming phone and email client inquiries – provide guidance, resolution and follow up
- Coordination and execution of all recurring operational client processes
- Initiating outbound calls to client personnel
- Conducting basic training on our reports and website
- Coordination of field events for client team including materials preparation and liaising with clients to organize visits
- Working closely with client teams to support our program delivery efforts
- Ensuring appropriate documentation and follow up with clients after branch visits and training
- Review and preparation of recurring client reports
- Providing administrative support to client teams including travel coordination
- Participation in periodic special projects

Position Qualifications

The successful candidate will be able to demonstrate:

- Keen attention to detail, coupled with strong organizational skills;
- Excellent communication and active listening skills;
- Experience successfully managing multiple priorities to ensure client satisfaction;

- The ability to take initiative and drive tasks to completion;
- Commitment to quality;
- Perseverance in the face of obstacles or challenges;
- Strong interpersonal and relationship building skills;
- Solid knowledge of major MS software packages including Excel & Word;
- Comfort with learning new computer applications.

In addition, the following skills are not required, but highly desired:

- Experience in a client service environment;
- Experience in the retail brokerage industry;
- Completion of the Canadian Securities Course;
- Fluency in French.

Expected Corporate Standards

Every employee of PriceMetrix and the successful candidate are expected to:

- Approach work in a collaborative manner: offer expertise readily and assist team members in accomplishing individual and collective tasks,
- Display initiative around their training and that of others, and actively pursue professional development opportunities,
- Offer and respond to feedback in a constructive manner,
- Think critically and be open to new approaches and 'better ways' – avoid taking the path of least resistance,
- Challenge our Clients, their colleagues, and themselves in the interest of making them more successful,
- Respond to business demands with urgency, and be calm and reasoned during pressure and crises,
- Exhibit pride and ownership in the quality of our services and products,
- Have personal respect for their colleagues and professional respect for everyone's role in our success,
- Represent the firm to Clients, prospects, vendors and candidates professionally,
- Treat Client information, and information about our businesses, in confidence,
- Communicate clearly.

Application Instructions

Interested candidates should submit their application to the recruiting team at recruiting@pricemetrix.com, citing the position title and job number CS041007 in the subject line.

Every application must include a cover letter, resume and compensation history and expectations.