

Project and Office Manager
Forstrong Global
Location: Toronto, ON
Start Date: July 1st, 2021
Duration: 12 month contract

Firm Overview:

Forstrong Global was founded in 2001 with the express purpose of offering institutional quality global macro strategies to investors. Since our inception we have demonstrated an ability to manage our client's assets through challenging markets and economic environments. With the longest track record in the world for managing globally balanced ETF only strategies, Forstrong has built an enviable record for delivering safer, more predictable returns. Our esteemed asset management team combines leading-edge proprietary research with a proven active macro process that is continuously updated to meet today's new possibilities.

Purpose/Objective:

We are looking for a Project and Office Manager to join our dynamic team in the Canadian financial investment market. This is an opportunity to join a team that helps bring to market strategies which deliver global exposure to investment solutions for our clients. The role of the Project and Office Manager is to support the day-to-day requirements of senior management and sales team. The Project and Office Manager will be responsible for a variety of analytic, coordinative and project management-oriented functions within our team.

Sales and Marketing Support

- Maintain sales and marketing meeting minutes to track activities, campaigns, projects and updates
- Support sales team on regular investment campaigns by generating product/competitor related collateral to assist teams in closing business
- Strong working knowledge of Salesforce CRM system to provide campaign feedback and promote best practices in Salesforce usage
- Generate reporting for territories including analysis to support sales team in achieving targets
- Support sales and operations with creation and management of DocuSign templates
- Post and maintain media content on website

Office and Operations Management

- Monitor general Outlook inboxes and forward to responsible teams for resolution
- Submit expense reports on behalf of senior management
- Manage vacation tracking
- Act as liaison between IT Support and staff
- Provide firm wide business communications and updates
- Gatekeeper for all portfolio manager schedules, speaker requests and coordinating bookings of their time

Finance and Reporting

- Assist with generating, processing and approving invoices and expense reports
- Perform data input to maintain and track firm AUM, budgets, revenues and expenses
- Work to refine/create a process & structure for forecasting with senior managers
- Monitor monthly and quarterly financials, provide updates to team member, liaise with finance

Project Management

- Support senior managers responsible for leading firm projects and initiatives
- Work with Investment Operations team to support client operations
- Accurate input of client data for onboarding and closure
- Monitoring and handling of client cash flow requests
- Processing bank wires, transfer ins/outs, RRSP & TFSA contributions, de-registrations and RRIF payments.
- Processing quarterly statements and fee billings
- Overseeing and maintaining client portal access
- Provide general client support with account, portfolio and tax slip information

Skills & Experience:

- 5+ years' experience in the Financial Services Industry
- Detail oriented, ability to check accuracy of work and provide consistent follow-up
- Proficiency with MS Office programs and the ability to learn other applications quickly
- Salesforce certification preferred
- Excellent communication skills, both verbal and written
- Action oriented, attention to detail with strong planning and time management skills
- Exceptional professionalism and demonstrates flexibility
- Effective at problem solving/trouble-shooting through accessing company resources
- The desire to work within an effective team to create collaborate and build a successful business
- Maintain positive relationships with staff, management and clients to ensure high level of satisfaction
- CSC & CPH is preferred
- CFA is an asset
- Bilingual, French is an asset

To Apply: Please send your resume and cover letter to info@forstrong.com