CONNECT WEALTH

Opportunity Profile

ADMINISTRATIVE ASSISTANT
CONNECT WEALTH

NELSON/KRAFT
AND ASSOCIATES

EXECUTIVE SUMMARY

Connect Wealth is seeking a dependable and detail-oriented administrative professional who values consistency, accuracy, and teamwork to join their team as an Administrative Assistant!

In this role, you will play a vital part in supporting the financial planning and advisory team by ensuring smooth daily operations and maintaining high standards of service and organization. This position is ideal for someone who enjoys working in a structured environment, takes pride in doing things right the first time, and appreciates clear expectations and collaborative support. You'll be part of a respectful and professional team that values reliability, thoughtful communication, and a calm, steady approach to problem-solving.

If you're someone who thrives on precision, enjoys helping others succeed, and prefers a stable, well-organized workplace where your contributions are truly valued, we'd love to hear from you.

WHO WE ARE

Founded in 2004 and built on our core principles of Value, Trust, and Simplicity, Connect Wealth has been providing superior client service to individuals, families, and business owners for decades. We are located in the Metro Vancouver area, yet we proudly serve clients across Canada. Our dedication to the highest level of service for our clients and our desire to always do what's best for their unique scenario has allowed us to successfully grow, primarily through client referrals. Our team of dedicated professionals each bring unique skillsets that allow us to come together to ensure our clients receive exceptional service. We aim to take the complexities of each client's financial world and create a financial plan that outlines a clear and simple path forward.

KEY RESPONSIBILITIES

- Greet clients in-person and over the phone with professionalism and warmth.
- Maintain and update client records and CRM system.
- Prepare meeting materials, presentations, and reports for client reviews.
- Prepare and process client paperwork including account applications, transfers, and service requests.
- Assist with compliance documentation and recordkeeping.
- Support financial advisors and the office manager with administrative tasks and special projects.

Collaborate with Team Members when appropriate to

- Manage calendars, schedule client meetings, and coordinate internal appointments using Outlook and Calendly.
- Track and order office supplies; liaise with vendors, as needed.
- Contribute to marketing and client engagement efforts (e.g. newsletters and event coordination).
- Ensure advisors have the information they need to serve clients effectively.

While you will have clearly defined responsibilities, the company's work environment is strongly team based, and you'll be expected to develop strong peer relationships for the benefit of the entire team.

QUALIFICATIONS

- Minimum of 5 years' administrative or office experience; financial services and/or insurance industry experience is an asset; full training will be provided.
- Strong organizational skills, accuracy, and detail-orientation are integral to success in this role.
- Excellent professional written and verbal communication skills.
- Tech-Savvy Professional: Demonstrated expertise in Microsoft Office Suite (Word, Excel, Outlook, PowerPoint) with a strong aptitude for quickly adapting to new technologies and digital tools. Experience with CRM platforms is highly valued.
- Able to maintain confidentiality and handle sensitive client information professionally.
- Self-starter with a positive attitude and strong work ethic.
- A professional demeanor coupled with a positive and constructive sense of humor.
- Full-time availability; Monday to Friday.

Preferred Skills

- Experience with client onboarding and financial account/insurance policy servicing.
- Comfortable in a client-facing role with excellent interpersonal skills.
- Able to work collaboratively in a team-based environment.

WHY JOIN US?

- Competitive salary with performance-based bonuses.
- Group benefits and RRSP matching (5% employer contribution).
- Paid time off and holidays.
- A strong team environment and all the resources you need to be successful.
- Opportunities for professional development and career growth.
- Convenient South Surrey location with a reverse commute.

OUR SEARCH TEAM

MARK KRAFT
LEADING THE SEARCH

Mark is a trusted and sought-after executive search leader, with over 20 years of combined experience in the public and private sectors. Bringing a deep level of care and commitment to his clients, Mark has successfully led over 100 executive talent searches across Canada, for roles ranging from CEO to CFO, to COO. With his breadth and depth of experience, Mark has become a respected advisor and go-to expert for non-profit, charity, and faith-based organizations looking to source top executive talent.

mark@nelsonandkraft.com
778.982.4427

SHARON CYMBALUK
SUPPORTING THE SEARCH

Sharon brings over twenty years of administrative experience to the team. For over a decade she has worked closely with CEOs and leaders of national charities, providing administrative support to over 50 boards, and managing national annual conferences. Sharon has assisted in over 60 executive searches and is excited to come alongside organizations and assist them in building their team of leaders.

sharon@nelsonandkraft.com
604.798.2626

ALEXA KROEKER
SUPPORTING THE SEARCH

With extensive experience in executive and board assistance, Alexa combines her recruitment expertise with a keen understanding of organizational needs to build high-performing teams. She's adept at crafting compelling job descriptions and leveraging targeted advertising strategies to attract the best candidates for Nelson/Kraft & Associates' clients, as well as sourcing purpose driven leaders in the recruiting space.

alexa@nelsonandkraft.com
604.226.8846

ESTIMATED SEARCH TIMELINE

While every search is dynamic and time frames are hard to predict, the following is an overview of the expected timeline and details for this search:

Location: Surrey, BC

Application Deadline: November 4, 2025

Short List Interviews: November 2025

Start Date: TBD

Salary Range: $65,000 - $70,000

HOW TO APPLY

Apply online at nelsonandkraft.com/jobs with your cover letter and resume. You must be eligible to work in Canada.

Nelson/Kraft & Associates Inc. is an executive consulting firm that specializes in working with not-for-profits and for-profit businesses across Canada, assisting them in the placement of senior executives and directors.

Nelson/Kraft & Associates Inc. welcomes and encourages all interested applicants to apply for this position and is committed to the principles of diversity and inclusion in its hiring practices, and will only make distinctions among interested applicants in accordance with the applicable Human Rights legislation.

Nelson/Kraft & Associates Inc. also welcomes and encourages applications from candidates with disabilities. Accommodations are available on request for candidates taking part in the selection process. If you require disability-related accommodation during the recruitment process, please contact us.