Relationship Manager (Bilingual)

fundserv certainty.

GREATER TORONTO'S TOP 2021 EMPLOYERS

2021 SME CANADA'S TOP SMALL & MEDIUM EMPLOYERS

Who are we?

Have you ever wondered what makes trading and settlement possible in Canada? It's Fundserv—the online ecosystem that ensures every fund transaction is processed timely, accurately and securely. We're an online hub that electronically connects manufacturers, distributors, and intermediaries, enabling them to buy, sell, and transfer investment funds.

Our Culture & Values

Fundserv is guided by our four core values: Collaboration, Adaptability, Integrity, and Respect. Because above all else, Fundserv CAIRs:

- Collaboration
- Adaptability
- Integrity
- Respect

Benefits & Perks

Fundserv provides a comprehensive benefits plan that includes the following:

- Health care spending account
- RRSP with employer match
- Annual performance pay
- Fitness reimbursements
- Employee discount program
- Charitable donation matching
- Flexible hours & remote work options

To better support our employees during Covid-19, we've expanded our benefits:

- Virtual social events including escape rooms, online trivia & games
- Corporate-wide mental health days
- Subscription reimbursement for fitness, nutritional, and mental health apps

Location:
Downtown Toronto (remote until further notice)

Reports to:
Industry Engagement Lead

Department:
Relationship Management

Fundserv is an equal opportunity employer. We welcome and encourage applications from individuals with disabilities. Accommodations are available on request – please let us know how we can meet your needs.

The Opportunity

The Relationship Manager actively meets with key contacts within the Canadian mutual fund industry, building and maintaining strong relationships to gain a deep understanding of their operations, issues, and challenges. This provides subject matter expertise for Fundserv and contributes to the development of new and improved automation solutions for Fundserv's customer base. In delivering value to the member firms, the Relationship Manager also compiles member network metrics, consults with members on network services and features, as well as creates and maintains training materials to facilitate member education sessions. In this role, you will:

- Plan and manage member facing meetings and activities
- Cover your assigned client segment and meet regularly with stakeholders to further the relationship and better understand their business needs
- Gain feedback from industry stakeholders regarding Fundserv initiatives
- Onboard new members and services to existing members
- Effectively collaborate with internal business partners and act as a voice for the member
- Maximize member relationships by assessing their business needs and offering creative solutions and opportunities to reduce time, cost, and risk
- Maintain, improve, and establish relationships through increased member interactions and excellent member service
- Sponsor and participate in member/industry conferences and events to increase our members' business and promote automation
- Participate in relevant committee meetings when required to gain a better understanding of new and current business processes.
- Identify discoveries for Fundserv to improve its product offerings & services
- Act as the voice of the member for various projects and initiatives across the organization and help collect targeted business intelligence
- Log all Member interactions, action items, and ideas in CRM
- Conduct in person or remote member training sessions with external members on all aspects of Fundserv and its operations including new member onboarding and support
- Develop and maintain a full understanding of Fundserv's proprietary systems and processes including emerging technologies to ensure consistent and accurate member support
- Assist management in delivering and supporting member events and meetings
- Assist Human Resources with internal training as it relates to new employee onboarding initiatives

Why YOU are the person we're looking for

- 7+ years operations/relationship management experience working for an MFDA or IIROC dealership, fund manufacturer or equivalent
- 5+ years' experience in a client service role
- Bilingual (French) is strongly desired
- Proven ability to confidently build and maintain relationships at different levels within an organization (including C level)
- Solid understanding of Fundserv and its role within the investment industry
- In-depth understanding of dealer back-office operations and systems
- Proficiency in Salesforce an asset
- A high degree of tact, diplomacy and professionalism
- Effective presentation, influence and negotiation skills
- Strategic thinker with the ability to see "big picture" solutions
- Strong sense of initiative, continuously striving to acquire and develop related business knowledge
- Demonstrated confident public speaking skills
- Ability to work independently with minimal supervision
- Proactive with a desire to provide an excellent customer experience
- Excellent communication and presentation skills
- Ability to travel – 50% minimum *(temporarily paused due to remote working)*
- University degree in a related field an asset
- Knowledge of investment products other than mutual funds an asset

If this sounds like you, apply today at hiring@fundserv.com.