

Job Posting

Position Title:	IS Helpdesk Administrator	Start date:	ASAP
Position Type:	Permanent, Full Time	Location:	Mississauga, ON
Reporting To:	Supervisor, Data Integrity & Tech Support	Department:	Information Services

Investment Planning Counsel Inc. is an integrated wealth management company focused on providing Canadians with the best in financial products, services and advice to help them achieve their financial dreams. IPC has developed a strategy that marries the needs of the planners with that of the Company. IPC's intent is to be the premier choice among financial planners who are dedicated to serving the needs of their clients. For more information about IPC, please visit: www.ipcc.ca.

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The Information Services department provides computing and information technology services and support to Investment Planning Counsel (IPC) Staff and Advisors. Information is vitally important to the way IPC operates, both for the services it provides to the Advisor community and also for its own efficiency. The department has two key functions: one involves taking a strategic lead on e-Services, both internally developed and 3rd party supplied, second being the support of the various services to both the Advisor community and internal users.

The primary role of this position is to answer all incoming calls and expediently resolve and log helpdesk tickets reported by IPC advisors, assistants, IPC head office and IPC Securities staff. Primary objectives include providing technical support on IPC Advisor Office including IPC Connect and related applications, NBCN web applications (e.g. iMost, Web Panagon, Net Rep, Croesus), W.connect, and to address any corporate email issues.

Job Responsibilities:

Provide IPC Advisor Office technical support – (35%)

- Assist IPC Advisors or Assistants on how to do the various day to day tasks on the IPC Advisor Office website
- Handle various maintenance issues pertaining to IPC Connect as experienced by Advisors and/or assistants
- Ensure all calls, online tickets, e-mails sent by advisors or assistants are responded to in a timely manner
- Escalate any website errors to 2nd level support groups
- Testing Participation of future deployments

Provide technical support for the various NBCN web applications. (20%)

- Reset Advisors or Assistants password for iMost, Web Panagon, Net Rep or Croesus
- New user set-up for iMost, Web Panagon, Net Rep or Croesus
- Process user terminations or changes to user access levels for iMost, Web Panagon, Net Rep or Croesus

Provide corporate email support. (25%)

- Assist Advisors or Assistants in setting up their *ipcc.org* or *ipcsecurities.com* email address' on their MS Outlook
- Troubleshoot issues pertaining to an Advisor/Assistant's inability to send or receive email
- Reset ipcsecurities.com and ipcc.org email passwords
- Assist Advisors / Assistants in setting their IPC email stationary
- Assist users in logging into our "Webmail" application

W.connect Technical Support and Data Integrity Issues. (10%)

- Effectively communicate with advisors regarding any data integrity issues via phone, help desk ticket or e-mail and escalate to the Data Integrity department when necessary
- Assist advisors and assistants with any technical issues regarding W.connect and escalate to second level support when necessary
- Resolve advisor or assistant enquiries within a timely manner

Monitor Remedy ticket queue (10%)

- Monitor tickets received in Remedy and assigned to appropriate individual in the IPC IT department for resolution
- Monitor pager for any high priority tickets and escalate to appropriate contact in the IPC IT department

Skills and Knowledge Requirements:

Work Experience: One to three years experience working within **call centre environment**. Able to learn new applications and/or experience with the following applications is an asset: W.connect, FundSERV Connect, iMost, Web Panagon, Net Rep or Croesus.

Education: Completion of post secondary education preferably in Computer/Technical fields.

Excellent planning, analytical, and problem solving skills: Must be able to manage and monitor multiple tasks across multiple matrix projects and time lines. Must have good general knowledge of project management methodology. Ability to understand issues and provide solutions in a timely fashion.

Strong verbal and written communication skills: Must be able to effectively communicate with both technical and non-technical people, be able to convey the effort involved in the delivery of the various requests.

Computer knowledge: Proficiency using the Microsoft Office Suite of products, mainly Outlook, Excel, Word and Access.

Team Player: Comfortable working both in a team environment & on individually assigned tasks. Excellent interpersonal and people skills. Able to effectively work with people at all levels.

Work Ethnics: Must be detail-oriented and quality-driven. Able to meet short deadlines and work well under pressure.

Customer Service: Excellent customer service and follow up skills. Able to relate to customer needs/problems and resolve issues quickly and effectively.

Working Conditions:

- Standard, corporate, office environment.
- Corporate business hours based on 37.5 hour work week from Monday to Friday; ability to work excess hours (including evenings/weekends) as maybe required.
- Sitting, standing, walking filing, faxing.
- Lifting file boxes up to 25 pounds in weight.
- Extensive use of computer and telephone.

Please forward your résumé and letter of interest to: Human Resources, Investment Planning Counsel Inc., by e-mail to **careers@ipcc.ca**.

When applying for this competition, please **specify in the subject line the title of the position** you are applying for.

Additionally, please answer the following questions in the body of your email:

- 1. Number of years of relevant work experience**
- 2. Number of years of work experience in the financial services industry**
- 3. Salary expectations**

We thank all applicants for their interest; however, only those selected for an interview will be contacted.
