



# Core Operations Associate, Transfers

TORONTO OR REMOTE (CANADA) / BUSINESS TEAMS - CORE OPERATIONS / FULL-TIME

Wealthsimple is a financial services company on a mission to help everyone achieve financial freedom by providing products and advice that are accessible and affordable. Using smart technology, Wealthsimple takes financial services that are often confusing, opaque and expensive and makes them simple, transparent, and low-cost.

With over 1 million people using Wealthsimple products, we are the market leader in Canada, and we're fast growing in the US and UK. Our team is working together to build one of the most innovative fintech companies in the world and we're looking for talented people who want to help us move fast, ship often and make a huge impact. Join us on our mission to make financial services simple and affordable for everyone!

Read our [Culture Manual](#) to learn more about us and how we work.

## In this role, you will have the opportunity to:

- Challenge the wealth management industry status quo to help enable all people to invest
- Work through different brokerage processes on a daily basis in service to our clients
- Create new and optimize existing business processes to improve our efficiency, reduce errors and transactional cost

- Empathize with clients and quickly grasp the issues they are facing to find simple solutions
- Work closely with other teams at Wealthsimple, including Client Success and engineering to continuously improve our service

## We're looking for someone who:

- Has 1-2 years experience working in a **high performing team** (institutional transfers/brokerage-related or startup team would be a plus)
- Is Passionate about technology, specifically **fintech**
- Has Experience with **SQL**
- Is **Naturally curious** if something seems off, you want to figure out what's going on
- Is a **problem solver with strong analytical skills**. A believer in knowing and understanding the numbers behind a problem
- Is a **driven difference maker**, you are willing to roll up your sleeves, take initiative and do whatever it takes to deliver and improve on our operations
- Has extreme precision and attention to **detail**
- Is an **excellent communicator** and able to convey complex ideas succinctly

## Skills we're looking for:

- *Want to make a difference* -We are a small team effectively reshaping how people look at the industry. We need people who want to play an integral part in helping us accomplish this mission
- *Proactive & assertive* - acts without being told what to do. Takes full ownership over work and proactively seeks help and input when needed
- *Communication* - Speaks plainly and truthfully. Communicates complex ideas in a simple & easy-to-understand way for any audience (e.g. engineering, 3rd party vendors, growth/operational teams)
- *Efficiency & action oriented* - ability to produce significant output with minimum wasted effort. Finds the path of least resistance to the problem definition, solution and execution

- *Data & analytics* - strong analytical and problem-solving skills with superior attention to detail
- *Collaboration* - excellent interpersonal skills and willingness to work in collaboration with various team members
- *Honesty/integrity* - doesn't cut corners. Does what is right, not what is politically expedient
- *Ability to learn and establish themselves as an expert* - demonstrates a natural curiosity. Approaches all situations with a growth mindset, willing to explore, learn and establish themselves as an expert in critical areas of the role

At Wealthsimple, we embrace difference. We believe that getting to the best outcomes requires diverse perspectives and backgrounds. We create space where all voices can be heard so that we can all do our life's best work. We're committed to openness, curiosity and creating an inclusive culture as we know that diverse teams build better products and generate better ideas. We strongly encourage applications from everyone regardless of race, religion, colour, national origin, gender, sexual orientation, age, marital status, or disability status.

Wealthsimple provides an accessible candidate experience. If you need any accommodations or adjustments throughout the interview process and beyond, please let us know.

[Wealthsimple Home Page](#)

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