

Assistant, Private Wealth Management

Jarislowsky Fraser Limited is a registered portfolio management firm. Founded in 1955 as a research boutique, Jarislowsky Fraser today manages the portfolios of pension funds, foundations, corporations and individuals in Canada, the United States and internationally — representing more than \$39 billion in assets under management. Headquartered in Montreal, we have offices in Calgary, Vancouver, Toronto and New York.

Location: Calgary, Alberta

Primary Responsibilities:

- Prepare and coordinate account opening and client profile update documentation
- Model, rebalance and generate trades for the portfolio managers (PMs) to review
- Verify the impact of portfolio transactions prior to execution
- Liaise with internal equity and fixed income traders
- Review client investment policies
- Provide analytical support for sales and marketing activities
- General tasks requested by the portfolio managers

Secondary Responsibilities:

- Prepare and verify compliance reports
- Analyze investment returns
- Customize quarterly reporting for clients

Requirements:

- 0-3 years of work experience (investment industry experience preferred)
- A related undergraduate University degree
- Willingness to enroll in the CFA program and/or CIM designation and/or registered AAR
- Strong knowledge of Excel and experience with Microsoft Office Suite

Skills:

- Organized with meticulous attention to detail
- Strong numeracy skills
- Proven time-management skills
- Excellent communication skills, both written and verbal
- Willingness to learn and adapt to change
- Reliable, with a good sense of judgment

We wish to thank all applicants for their interest in applying for this position, however, only candidates selected for interviews will be contacted. Please send your CV and cover letter to kcarriere@jflglobal.com

WE ARE AN EQUAL OPPORTUNITY EMPLOYER <http://www.jflglobal.com>