

Business Process Support Specialist

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 \$40 billion in assets under management. Solidified by a strong fiduciary culture, JFL has a long history of advocating for good governance. Headquartered in Montreal, we have offices in Toronto, Calgary, Vancouver and New York.

We are currently seeking a **Business Process Support Specialist** to join our Montreal office. The candidate is an undergraduate in a related field with 5 to 7 years of experience in operations and business processes, preferably with an investment and/or financial background. We are looking for a driven, talented individual with an excellent understanding of the products, processes and technologies used in the organizations of the investment industry. The candidate should possess an entrepreneurial attitude, be comfortable in taking initiative and suggesting new ideas, processes and improvements.

Location: Montreal

Responsibilities

- Account opening, online client portal, Microsoft Dynamics 365 CRM
- Act as a business process support analyst in providing account administration support to Portfolio Managers and their teams.
- Maintain and update interfaces for data import/ export to various systems.
- Develop and maintain documentation (workflow, application architecture/standards, training).
- Monitor, measure and report on operational issues.
- Collaborate with various business units to review, develop and implement operational initiatives.
- Work to improve the client experience online and through the use of the CRM tool.
- Lead projects focusing on client operations.
- Monitor new account transfers, both in-cash and in-kind, and reconcile against account statements.
- Liaise with external custodian contacts and internal stakeholders

Requirements

- Previous experience using the Advent suite of products (APX, ACD/REX, Revenue Center, Moxy).
- Extensive experience with Excel.
- A good understanding of securities transactions and reporting.
- Comfortable working directly with investment and trading professionals.
- Ability to work both independently, prioritizing workload and seeking support when appropriate.

Skills/ Competencies / Attributes

- Excellent thought logic process, extremely detail oriented.
- Strong organizational, communication and problem solving skills.
- Ability to handle multiple tasks quickly and efficiently.
- Takes initiative and is results driven.
- Be able to communicate effectively with both internal teams and external vendors.
- Manages key time frames and important deadlines.
- Leadership skills to engage and motivate teams.
- Ability to manage a small team and meet business objectives.
- Excellent bilingual communication skills both verbal and written.

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

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