

Assistant, Portfolio Management

Jarislowsky Fraser Limited (JFL) is a registered portfolio management firm founded in 1955 as a research boutique. As of June 30th 2019, JFL manages more than \$38 billion Canadian on behalf of pension funds, foundations, corporations and individuals in Canada, the United States and internationally. 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.

Location Calgary

Purpose

A unique opportunity for someone with an interest in the client-service side of investment management, at an established and growing global investment manager.

The role supports the Institutional Management Team, however it will also support Private Wealth, and contribute to the overall success of the Calgary office.

Key Responsibilities

- Model, rebalance and generate trades for the Portfolio Managers 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.
- Prepare client and prospect presentations as requested by Portfolio Managers.
- Prepare and verify compliance reports.
- Analyze investment returns.
- Customize monthly and quarterly reporting for clients.
- Understand how JFL's risk appetite and risk culture should be considered in day-to-day activities and decisions.
- Prepare and coordinate account opening and client profile update documentation.
- Medium term potential to take on additional responsibilities in a more client-facing capacity.

Qualifications

- High-level of attention to detail and accuracy.
- Strong numeracy skills.
- Willingness to learn and adapt to change.
- Reliable, with a good sense of judgment.
- Excellent communication skills, both written and verbal.

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Reporting Relationships

Primary Manager:	<ul style="list-style-type: none">Managing Director & Co-Head Institutional Management - Canada
Direct Reports:	<ul style="list-style-type: none">Nil
Shared Reports	<ul style="list-style-type: none">Nil

Dimensions

<ul style="list-style-type: none">Provide support to both Institutional and Private Wealth teams in Calgary

Education / Experience / Other Information

<ul style="list-style-type: none">Bachelor in Business or Economics or another related fieldWillingness to enroll in the CFA program and / or CIM designation and / or registered AAR0-3 years of work experience in a similar roleStrong knowledge of Excel and experience with Microsoft Office Suite
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Working Conditions

- Work in a standard office-based environment.
- Limited travel required for this position.

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