JARISLOWSKY FRASER

GLOBAL INVESTMENT MANAGEMENT

Millennium Tower
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Calgary, Alberta T2P 5E9
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Portfolio Manager, Institutional Management (Registered)

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 $35 billion in assets under management. Headquartered in Montreal, we have offices in Toronto, Calgary, Vancouver and New York.

The registered Portfolio Manager, Institutional Management contributes to our institutional business development and sales effort. They will be responsible for business development initiative and sales as well as selling our suite of product offerings, sourcing new business, building strategic relationships with consultants as well as bring a strong leadership to the team. This position reports directly to Head, Iinstitutional Management - Canada and works on a wide variety of portfolio and client service matters and provides exposure to the entire institutional portfolio management process.

Location Calgary

Key Responsibilities

- Contribute to our institutional sales effort and lead / co-lead clients meetings, pitching new clients either institutional, pension, high-net-worth or family offices.
- Ensure that the portfolios are managed according to their intended strategy within any guidelines or constraints supplied by the client and responds to client's queries and/or delegate/support the Assistant, Institutional Management in doing so.
- In servicing clients, may receive requests from clients of a wide ranging nature such as broad market information, specific data about the portfolios including rate of return metrics, etc.
- Meet regularly with clients and prospects to provide updates on portfolios and the firm's investment
- Build a network around foundations and family offices
- Represent JFL at conferences and other events
- Check adherence to various compliance rules and policies, client investment policy and recommendations
- Give direction to the SME and the assistant to update marketing presentations
- Other related responsibilities

Qualifications & Requirements

- 8+ years of experience in a business development/client service role with a proven track record of establishing new business within the institutional marketplace
- Demonstrable track record of asset raising, preferably in the long-only equity space
- Extensive knowledge of the institutional marketplace, including pension, insurance, endowment, foundation and sub-advisory clients
- Strong leadership, communication, presentation and relationship building skills
- Initiative and an entrepreneurial mindset

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- Team player, able to successfully interact with individuals across all of our offices
- Undergraduate/Master's degree in Business, Math, Finance or related fields and/or MBA or Chartered Financial Analyst (CFA)
- Proficient with MS suite (Word, Excel, PowerPoint)

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

We are an Equal Opportunity Employer.