
Supervisor Client Service Administration, Operations

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. 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 Montreal

Purpose

Leads and oversees Client Service Administration and Reconciliation teams in all Canadian offices ensuring business strategies, plans and initiatives are executed / delivered in compliance with governing regulations, internal policies and procedures.

Accountabilities

- Leads and drives a customer focused culture throughout their team to deepen client relationships and leverage broader JFL relationships, systems and knowledge.
- Fosters continuous improvements and innovation within all teams to help perpetuate a high performance culture.
- Ensure execution accuracy, timeliness and completeness in daily primary tasks across all teams.
- Help support complete, accurate and timely reconciliations for daily and monthly values clients as well as maintain other account specific master data
- Understand how the JFL's risk appetite and risk culture should be considered in day-to-day activities and decisions.
- Creates an environment in which his/her teams pursues effective, efficient and consistent operations of his/her respective areas in accordance with JFL's Values, its Code of Conduct and the Global Sales Principles, while ensuring the adequacy, adherence to and effectiveness of day-to-day business controls to meet obligations with respect to operational, compliance, AML, KYC, regulatory and conduct risk.
- Builds a high performance environment and implements a people strategy that attracts, retains, develops and motivates their teams by fostering an inclusive work environment and using a coaching mindset and behaviours; communicating vision/values/business strategy; and, managing succession and development planning for the team.
- Responsible for the Reception areas (employees and processes) in all locations.

Qualifications

- Exceptional customer service, portfolio administration and communication skills.
- High-level of attention to detail and accuracy.
- Thorough knowledge of portfolio administration, reconciliations and its workflows and regulatory requirements
- Strong people management skills.
- Hands-on approach in order to lead by example.

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Reporting Relationships

Primary Manager:	<ul style="list-style-type: none">• Associate Director, Operations
Direct Reports:	<ul style="list-style-type: none">• Clients Service/Portfolio Administrators• Account Data Management Administrators• ACD/REX team
Shared Reports	<ul style="list-style-type: none">• Client Service Administrators shared reports with Portfolio Managers

Dimensions

<ul style="list-style-type: none">• Approximately 50 employees across Canada• Supports all business areas within the four locations• Multiple projects• Multiple systems

Education / Experience / Other Information

<ul style="list-style-type: none">• Bachelor in Business or Economics or another related field• CSC designation• Minimum of 10 years of investment experience• Knowledge of bank regulations• Fluent in French and English is a requirement

Working Conditions

- Work in a standard office-based environment; non-standard hours are a common occurrence.
- Moderate travel, on a quarterly basis to Toronto office and on a semi-annual basis to Calgary and Vancouver offices.