

Associate, Private Wealth Management

Jarislowsky, Fraser Limited is an investment management firm with over 60 years of experience conducting fundamental research and managing assets for pension funds, foundations and endowments, corporations and individuals in Canada and internationally — representing more than CA\$56 billion in assets under management. Our history and culture are rooted in investment stewardship that is expressed through an adherence to quality investing consistent with our long-standing investment philosophy and the advancement of good governance and sustainable investing. Acting in the best interests of our clients is the cornerstone of everything we do. Headquartered in Montreal, we have offices in Toronto, Calgary, Vancouver and New York.

Location Montreal

Purpose

Contributes to the overall success of the Private Wealth Department ensuring specific individual goals, plans, initiatives are executed / delivered in support of the team's business strategies and objectives. Ensures all activities conducted are in compliance with governing regulations, internal policies and procedures.

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 Private Wealth functional areas, and contributes to the overall success of the Portfolio Management Team in Montreal.

Key Responsibilities

- Champions a customer focused culture to deepen client relationships and leverage broader JFL relationships, systems and knowledge.
- Prepare and coordinate account opening and client profile update documentation.
- 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.
- Medium term potential to take on additional responsibilities in a more client-facing capacity.
- Understand how JFL's risk appetite and risk culture should be considered in day-to-day activities and decisions.
- Actively pursues effective and efficient 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/ATF/sanctions and conduct risk.
- Champions a high performance environment and contributes to an inclusive work environment.

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.

Reporting Relationships

Primary Manager:	<ul style="list-style-type: none">• Regional Director - Quebec, Private Wealth Management
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 Private Wealth team in Montreal.

Education / Experience / Other Information

<ul style="list-style-type: none">• Bachelor in Finance, Business, Economics or another related field• Willingness to enroll in the CFA program and / or CIM designation and / or registered AAR• 1-3 years of work experience in a similar role• Strong knowledge of Excel and experience with Microsoft Office Suite• Bilingualism is a requirement (French and English)
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Working Conditions

- Work in a standard office-based environment.
- No 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