

Portfolio Assistant, 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, Toronto & Calgary

Purpose

Contribute to the overall success of the Private Wealth Department by ensuring that specific individual objectives, plans and initiatives are executed and implemented to support the team's business strategies and objectives. Ensure that all activities carried out comply with applicable regulations, internal policies and procedures.

The Portfolio Assistant is responsible for providing overall support to the Private Wealth Management team. The main responsibilities consist of supporting client account opening and onboarding, as well as supporting Associates, and Portfolio Managers in achieving a high level of service to partners, prospects, and clients.

Key Responsibilities

- Champion a customer focused culture to deepen client relationships and leverage broader the firm's relationships, systems and knowledge
- Manage and complete client account opening and remediation processes with all relevant parties
- Become the primary resource for obtaining the correct client documentation depending on the type of account being opened
- Distribute client documentation to all relevant internal partners while leveraging and maintaining electronic filing system
- Support Associates and Portfolio Managers with portfolio management related activity.
- Assist with the adherence of internal and external compliance standards
- Provide administrative support to the Private Wealth team related to onboarding, and portfolio management activity.
- Actively pursue 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.
- Understand how the firm's risk appetite and risk culture should be considered in day-to-day activities and decisions.
- Champion a high performance environment and contributes to an inclusive work environment.

Qualifications

- Strong organizational skills with the ability to set priorities and manage time
- Excellent interpersonal and communication skills, both written and verbal
- High degree of accuracy and attention to details is required
- High level of discretion required in dealing with confidential matters
- Verifies accuracy of information and facilitates smooth execution of client trades
- Ability to effectively share information and be a liaison between groups
- Capacity to learn new systems and processes

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Reporting Relationships

Primary Manager:	Regional Director, Private Wealth Management
Direct Reports:	Nil

Dimensions

- Assist the entire Private Wealth team with their onboarding and remediation process.

Education / Experience / Other Information

- Bachelor degree in Finance, in Business or another related field
- Comfort and familiarity with CRM systems
- Willingness to enroll in the Canadian Securities Course
- 1-3 years of work experience in a similar role
- Strong knowledge of Excel and experience with Microsoft Office Suite

Working Conditions

- Work in a standard office-based environment; currently working from home
- No travel required

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.