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## Portfolio Manager, Private Wealth Management (Registered)

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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** Toronto

### **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.

Focus is on expanding our Private Wealth clientele in the greater Toronto area. A positive self-starter, comfortable and articulate with JFL's Investment philosophy and execution principles; a proven track record in the development of Private clientele. Generate sustainable and profitable growth by acquiring and retaining both clients and assets.

### **Key Responsibilities**

- Champions a client focused culture to deepen relationships and leverage broader firm relationships, systems and knowledge.
- Ensure a comprehensive and solid understanding of each client's financial needs, risk tolerance, and long-term objectives by maintaining ongoing dialogue (both verbal and written) with clients, to stay abreast of any changes in client needs or capital market conditions that may affect clients' financial objectives.
- Recommend an appropriate asset mix model for a client's circumstances, income needs, and return expectations, selecting securities in accordance with the firm's views that fulfill clients' objectives, regularly monitoring portfolios and making changes as appropriate.
- Manage client portfolios in accordance with the firm's guidance, leveraging available pooled fund securities wherever feasible. Ensure asset mix is in accordance with client directive and research team philosophy and adjust when necessary.
- Ensure a high level of client satisfaction and retention. Establish a client contact schedule to ensure that clients are contacted based on an appropriate service standard both by telephone and in person.
- Grow assets under management by consolidating assets from existing clients, getting referrals for new clients, and other internal partners / external centres of influence. Support Managing Directors and Directors through completion and presentation to existing clients and new prospects.
- 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 firm'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.

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### Qualifications

- High-level of attention to detail and accuracy.
- Strong communication, organizational and interpersonal skills with a service orientation.
- Excellent communication skills, both written and verbal.
- Proactive and professional.
- Results oriented.
- High levels of self-motivation and self-discipline.
- Reliable with a good sense of judgment.

### Reporting Relationships

<b>Primary Manager:</b>	<ul style="list-style-type: none"><li>• Managing Director, Global Private Wealth Management</li></ul>
<b>Direct Reports:</b>	<ul style="list-style-type: none"><li>• Nil</li></ul>
<b>Shared Reports</b>	<ul style="list-style-type: none"><li>• Nil</li></ul>

### Dimensions

- Personal book of business size - Asset Under Management
- Net Revenue production objective to be established
- Overall relationships
  - Retention of existing clients
  - New client relationships

### Education / Experience / Other Information

- Bachelor's degree or equivalent experience required, preferably in Finances.
- Minimum 15 years direct experience in discretionary investment management, covering both financial analysis and managing portfolios (individuals, estates, trusts, foundations, registered accounts), with an expert understanding of investment returns, potential risks and the associated tax implications.
- Strong relationship management skills. Proficient in sales and business development.
- Strong knowledge of the financial markets.
- Experience and contacts in Private Wealth Management.
- Driven, talented individual with exceptional presentation skills.
- Candidate must possess a strong referral network.
- Entrepreneurial spirit, driven, autonomous.
- Must meet the regulatory requirements to be registered with the appropriate securities commission.
- Registered investment professional designation such as the CFA charter and/or CIM.
- Registered with the OSC/'Autorité des marchés financiers'.
- Ability to work calmly and intentionally under pressure.
- A commitment to confidentiality.
- Demonstrated PC literacy, proficiency in Microsoft office including PowerPoint.

### Working Conditions

- Work in a standard office-based environment; non-standard hours are a common occurrence. Working from home if required – during the pandemic.
- The business environment is fast-paced, complex and demanding.
- Constant use of personal computer, various leading-edge and business-oriented software technologies. The role may require long hours at a personal computer in preparation of documents and presentations.
- Travel may be required.