

JOB OPPORTUNITY

Position: **Associate, Private Client Group**
Reporting to: Managing Director, Private Client Group
Term: Full time
Hours: 9 am – 5 pm with extended hours sometimes required
Location: work from home to start, Office Location - 20 Eglinton Ave West

Overview

The Associate will work with Portfolio Managers in support of high-net-worth clientele within the Beutel Goodman Private Client Group (PCG). The Associate will be a key client contact on administrative matters, and will be responsible for providing timely and high quality service.

Key Responsibilities

- Onboard new accounts and ensure that all mandatory documentation is organized and complete
- Maintain ongoing client documentation to comply with regulatory requirements and internal compliance procedures
- Maintain account-related information in the CRM database
- Reconcile cash balances and asset positions with custodial records
- Assist in the trading and settlement process for client accounts
- Respond to inquiries from clients, custodians and coworkers in a timely and professional manner
- Assist in production of periodic (monthly/quarterly) and ad hoc client reports, presentations and projects
- Provide support for other team members
- Perform related duties as assigned

Requirements

- Bilingual (English/French), preferred
- Post-secondary education
- At least three years of administrative and/or client service experience within the financial industry
- Excellent verbal and written communication skills
- Completion of CSC or IFIC course strongly preferred
- Proficiency with Microsoft Office
- Knowledge of SS&C Pacer program, preferred
- High data input accuracy and exceptional attention to detail
- Ability to prioritize tasks and work well under pressure to meet tight deadlines
- Strong personal initiative combined with excellent analytical and problem solving skills
- Team player with a positive attitude

To apply, send your resume to careers@beutelgoodman.com

Deadline for submission: Feb 5, 2021