BEUTEL GOODMAN
Investment Counsel

JOB OPPORTUNITY

Position:	**Senior Associate, Client Service**
Reporting to:	**Senior Vice President, Client Service / Business Development**
Term:	**16-month contract (Mat leave coverage**)
Location:	**20 Eglinton Ave West, Toronto**

Overview

The Senior Associate, Client Service position contributes to the success of the company's business development and client servicing activities by liaising with the company's clients, consultants and prospects while providing administrative support to the Institutional client service / business development team members.

Responsibilities

- Oversee the opening of new accounts by coordinating the documentation and implementation of new portfolios with the relevant departments (portfolio administration, compliance, portfolio managers).
- Conducting anti-money laundering and anti-terrorist checks for new accounts
- Facilitate modifications in investment policies for each account (update appropriate systems, advise and follow-up with the various internal participants).
- Record and update client contacts and other related information in Satuit (CRM system).
- Review, coordinate and ensure timely delivery of custom reports and ad-hoc requests.
- Make necessary adjustments to client monthly and quarterly reports to ensure reports are sent out in a timely manner.
- Monitoring industry changes and advising Business Development team when client accounts are affected by those changes.
- Keeping 'know your client' information up to date.
- Overseeing that all documents received from clients and consultants comply and adhere with the company's approved standards.
- Confirming that recommended investment strategies are appropriate and properly aligned with client's goals and risk profiles and informing Relation Manager of any discrepancies.
- Collaborate with other members of the team on common projects (special events, process enhancements, etc.) and provide back-up to other Client Service Associates when necessary.

Qualifications

- Minimum 3 years of relevant experience in a client service support function within the financial services industry
- Proficient in Outlook, Excel, Word, PowerPoint
- Experience with CRM Satuit database would be an asset
- Knowledge of eVestment, Mercer web applications would be an asset
- Persistence and attention to detail
- Ability to contribute ideas and demonstrate initiative
- Ability to multitask and prioritize workload
- Through knowledge of the financial industry and of investment portfolios and products