



Position Title	Associate to Investment Advisor
Location	Burlington
Reporting To	Investment Advisor
Position Overview	<p>To provide support to a high net worth investment management team. The Associate will be responsible for reporting and analysis.</p>
Duties and Responsibilities	<ul style="list-style-type: none">• Create and organize weekly and monthly investment performance reviews• Analyze and prepare mutual fund reviews using Morningstar• Develop and manage client consolidated investment performance reports• Review Client Asset Allocation to ensure proper asset mix and investment positions• Assist IA in collecting data from clients for creation of Financial Plans• Assist IA in creating prospective client Investment Plans• Manage the team's website with current information and assist with marketing initiatives utilizing prospecting online tools• Track new business asset growth against practice targets and monitor all pending account transfers to ensure completion on a timely basis• Send weekly client market communications via Campaign Breeze• Assist in social media prospecting mandates on LinkedIn and Twitter• Execute buy/sell transactions for client accounts• Assist Sales Assistant in clearing client debits and excess administration
Qualifications	<ul style="list-style-type: none">• Proficient in English, oral and written• Proficient with Microsoft Excel, Word and PowerPoint• Organizational skills, ability to prioritize and embrace process• Ability to meet tight deadlines• Autonomy, initiative and attention to detail• Passion for investment products and ability to support IA with research analysis• 1 to 3 years' experience in the financial sector
Education	<ul style="list-style-type: none">• University degree in a related discipline would be an asset• Completion of the Canadian Securities Course and Conduct and Practice Handbook would be an asset