RICHARDSON GMP

Position Title	**Associate Portfolio Manager**
Location	Calgary
Reporting To	Director, Wealth Management, Portfolio Manager
Position Overview	To provide high level support to a high net worth investment management team.
Duties and Responsibilities	• Act as primary point of contact for assigned client relationships • Conduct due diligence research on individual securities and funds & build model portfolios • Support the team in the management of client accounts and the preparation and review of client presentations • Maintain administrative liaison with the different operations departments • Track and provide recommendations re tender offers, redemptions and reimbursements etc. • Execute buy/sell transactions of shares, bonds and other investment products for client accounts
Qualifications	• Entrepreneurial team player • Autonomy, initiative and attention to detail • Proficient in English, oral and written, and Microsoft Office Suite • Organizational skills and ability to prioritize • Ability to work under pressure • Capable of doing investment research and building model portfolios • Capable of recruiting assets • Current knowledge of industry compliance issues • Excellent phone and e-mail etiquette, delivering high standards of customer service • 3 to 5+ years of experience in the wealth management industry
Education	• A Business, Finance or Economics Diploma or Degree from a recognized post-secondary institution is preferred • CFA candidate desired, either charter holder or Level II or equivalent • Licensed as a Registered Representative (RR) or an Investment Representative (IR) with IIROC