



Position Title	Portfolio Analytics Assistant
Location	Montréal
Reporting to	Branch Management / Director, Wealth Management & Portfolio Manager
Position Overview	<p>The Portfolio Analytics Assistant will assist the Portfolio Manager with the implementation, rebalancing and oversight of client portfolios. Additional responsibilities include generation of proposals for prospective clients.</p>
Duties and Responsibilities	<ul style="list-style-type: none">• Must be able to apply principles of asset allocation to client portfolios• Conduct research of dividend-growing stocks• Must have an understanding of the 8200 Canadian ETFs, Mutual Funds and alternative strategies funds• Responsible for producing reports and monitoring client positions to ensure they are in line with model portfolios and proposals• Attend wholesaler meetings and investment presentations• Generate reports and proposals• Review and optimize investment processes• Execute trades• Ad-hoc projects
Qualifications	<ul style="list-style-type: none">• Autonomous and resourceful• Interest in finance field through work experience and/or education• Proficient in Microsoft Excel, PowerPoint and Word• Capable of working under pressure• Capable of learning new systems quickly• Perfectly bilingual (French and English), written and spoken• Strong sense of organization and managing priorities• Team spirit• Knowledgeable of financial and tax planning would be an asset
Education	<ul style="list-style-type: none">• CFA designation