



Position Title **Portfolio Analytics Assistant/Associate**

Location Montreal

Reporting To Director Wealth Management

Position Overview To assist the Director with the implementation, rebalancing and oversight of client portfolios. Additional responsibilities include generation of proposals for prospective clients.

- Duties and Responsibilities**
- Must be able to apply principles of asset allocation to client portfolios in order to execute and monitor trading
 - Must be proficient in Microsoft Excel, PowerPoint and Word
 - Will be responsible for producing reports monitoring client positions to ensure they are in line with model portfolios
 - Will assist Director with transitioning existing clients to model portfolios
 - Will need to develop working manuals to ensure that processes are documented
 - Will have communicated with Managed accounts and other team members
 - Planning and organizing retirement plans and proposals
 - Managing information or general administration support for administration requests for funds or when new moneys are added to portfolios
 - Monitoring and reporting of models, proposals and plans
 - Producing Surviving Retirement analysis and reports
 - Producing Portfolio Stress Test reports
 - Creating and developing power point presentations for groups
 - Maintaining and updating social media site(s) (i.e. LinkedIn)

- Education**
- Preferred Bachelors level
 - CSC IR licensed
 - Industry experience preferred

- Qualifications**
- Demonstrated interest in finance field through work experience and/or education
 - Strong Proficiency in Microsoft Excel, Word and PowerPoint
 - Experience at a brokerage or financial planning firm, or brokerage call center an asset