



Position Title	Associate/Assistant to Portfolio Manager
Location	Ottawa
Reporting To	Branch Management
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">• Support the Portfolio Managers in general administrative duties in the management of client accounts• Support the Portfolio Managers prepare client reviews and presentations• Assist the Portfolio Managers in collecting data from clients to create financial plans• Manage the team's website with current information and assist with marketing initiatives utilizing prospecting online tools• Request information and documentation from clients in order to open accounts and keep client files up to date• Maintain administrative liaison with the different operations departments• Type memos, letters and documents• Prepare and manage periodic mass mailings to existing and potential clients• Act as contact person for clients concerning products, procedures and policies• Notify Portfolio Managers of tender offers, redemptions and reimbursements etc.• Provide current price quotation to clients referring to quote services and trading desk personnel• Follow up on client trades to ensure proper settlement and delivery by informing the appropriate departments to take the necessary measures• Monitor all pending transfers to ensure completion on a timely basis• Execute buy/sell transactions of shares, bonds and other investment products for client accounts
Qualifications	<ul style="list-style-type: none">• Bilingual an asset (English & French)• Proficient with Microsoft Office Suite• Organizational skills and ability to prioritize• Ability to work under pressure• Autonomy, initiative and attention to detail• Knowledge of daily market activity to provide information to clients• Current knowledge of compliance issues published in internal bulletins• Excellent phone and e-mail etiquette, delivering high standards of customer service• Ability to balance time pressures and deadlines with conflicting demands• 3 to 5 years' experience in the financial sector
Education	<ul style="list-style-type: none">• High School Diploma• Post-secondary education in a related discipline would be an asset• The completion of the CSC (Canadian Securities Course) and CPH (Conduct and Practice Handbook)• Investment Representative (IR) or Registered Representative (RR) with IIROC an asset