RICHARDSON GMP

Position Title	**Portfolio Analytics Associate**
Location	Vancouver
Reporting To	Senior Vice President & Portfolio Manager

Position Overview

The ideal applicant will be an active team participant in an expanding high net worth holistic wealth management business and will be responsible for providing world-class, client-centered service in the Portfolio Analyst Associate role. This individual will work as an integral part of a highly motivated team, all of whom understand that our clients are the cornerstone of our business and that in everything we do, the interests of our clients come first.

The Advisor team differentiates itself through relentless adherence to its four core principles: Respect for our clients, Integrity, Discipline, and Independent Thinking. Our brand emanates through consistent timely delivery of best-in-class service to our clients, prospects, and other business stakeholders. *Exceeding expectations is the standard.*

Duties and Responsibilities

- Ensure a consistent delivery of Advisor team's brand of service level: Proactive, Responsive, & Professional
- Responsible for developing and maintaining all analytical tools used in portfolio construction and risk management processes
- Build and refine a streamlined asset allocation model to improve execution of investment management decisions. Create processes, maximize efficiency, minimize risk, and increase productivity
- Executing block trades across the entire book, including allocating capital and rebalancing portfolios
- Responsible for creating client review material using Excel and PowerPoint, which includes calculating risk management metrics and performance metrics
- Ongoing monitoring, analysis and reporting of existing model portfolio positions and changes
- Will assist Portfolio Managers with transitioning existing clients and new clients to model portfolios
- Assisting the Portfolio Managers in day to day activities that require a degree of analytical skills/number crunching
- Assemble market and economic research to Advisors
- Research new investment themes and determine viability in context of set investment criteria and philosophy
- Keep up to speed on client circumstances (short and/or long term) as it relates to their Wealth Plan and make adjustment in portfolio appropriately
- Provide marketing support with respect to investment management proposal to clients and prospects

Education/Experience	• Experience or a keen understanding of financial markets investments and portfolio analytics a must • A high proficiency in Excel is mandatory • A good knowledge of PowerPoint is required • Knowing VBA or another coding language is a valuable asset to have as many of the analytical tools are VBA, Excel and Macros • IIROC Licensed, or ability to become licensed in short order • Undergraduate degree in Finance is preferred
Qualifications	• A positive and enthusiastic attitude • Detail-oriented and exhibits strong organizational skills • Demonstrate the ability to prioritize and meet timely deadlines • Strong fact finding and problem solving/troubleshooting skills • Aptitude to create, implement and adapt to new processes • Exceptional skills with Excel and data query tools & programming • Strong proficiency with portfolio management tools would be preferred (i.e., Thomson One, Bloomberg, Toogood Financial Systems and Dataphile)