



GUARDIAN CAPITAL | PRIVATE WEALTH

JOB TITLE: Client Portfolio Manager
DEPARTMENT: Guardian Capital Advisors LP (“GCA”)
REPORTING TO: Managing Director, Head of Private Wealth Management
LOCATION: Toronto, Ontario

JOB STATEMENT:

Guardian Capital Group Limited (“GCG”) is a diversified financial services company which serves the needs of clients ranging from private clients to institutions. Guardian Capital Advisors LP (“GCA”), the private client arm of GCG, is a dynamic and rapidly growing wealth management firm managing approximately \$3B for clients primarily in Canada, but also into the US and Caribbean. Our focus at GCA is to work with our clients to achieve their long term wealth, succession, retirement and charitable giving objectives. As a trusted advisor we work closely with our clients’ taxation, estate planning, and insurance advisors delivering a holistic solution and client experience.

GCA (<https://www.guardiancapital.com/private-wealth-management/>) has a dynamic opportunity for a motivated individual who desires working in a progressive, team-based financial services environment.

ESSENTIAL FUNCTIONS:

- Maintaining regular and direct communication with existing clients with respect to their portfolios, investment strategies, capital markets and performance including periodic client meetings;
- Providing portfolio management advice with respect to portfolio construction, overall asset mix, and asset allocation, both within portfolios and amongst a family’s assets;
- Working with and attracting high net worth individuals and families, as well as small private and public foundations;
- Developing meaningful relationships with clients’ financial, legal, accounting and insurance advisors, either individually, or working closely with the team;
- Assisting in key client events, branding and strategic initiatives across the business; and
- Leading business initiatives and/or supporting the Managing Director in these efforts as well as those for GCG.

JOB SPECIFICATIONS:

- University degree – preferred major in business
- Chartered Financial Analyst
- 5 + years performing research involving the financial analysis of investments
- 5 + years’ experience servicing investment/private clients strongly preferred
- Excellent understanding of financial markets and the ability to communicate the same with clients of varying levels of financial sophistication
- Affinity to cultivating client and business development relationships
- Excellent written and verbal communication skills
- Strong time management and interpersonal skills
- Understanding the team culture, and leverage the assets of GCG as required

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@guardiancapital.com. Guardian Capital is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Guardian Capital will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview. We thank all applicants for their interest but only those selected for an interview will be contacted.