



**JOB TITLE:** Investment Services Associate  
**DEPARTMENT:** Retail, Guardian Capital LP (“GCLP”)  
**REPORT TO:** Vice President, Investment Services  
**LOCATION:** Toronto, ON

**JOB STATEMENT:**

GCLP has an immediate need for an Investment Services Associate. As part of the team focused on our retail clients, the main responsibility of this position is client reporting, communications, and to act in a liaison role with internal providers for the required data. This role would be suitable for either an individual in a similar role or an individual interested in building a career in the investment industry.

**ESSENTIAL FUNCTIONS:**

**Client Reporting:**

- Coordinating the creation and distribution of monthly and quarterly client reports with department executives;
- Gathering and/or editing the data, text and graphs used in quarterly reports or other client due-diligence projects as assigned;
- Assisting in the collection and ongoing maintenance of the client and prospect CRM database;
- Assisting in the preparation and distribution of any special client reporting request;
- Assisting in the preparation response to requests from clients and consultants;
- Drafting and maintaining client presentation materials; and
- Coordinating and scheduling the production of marketing materials with internal teams.

**Office Administration:**

- Assisting in the binding, assembling and mailing of quarterly reports;
- Providing back-up administration support to other members of the team;
- Maintaining accurate records and filings; and
- Fielding incoming calls and taking appropriate action to service client and prospect requests.

**QUALIFICATIONS:**

- Post-secondary degree (preferably with an orientation toward business, finance, or communications)
- A minimum of 1 to 3 years of financial industry experience
- Completion (or working towards) the CSC and/or CFA designation is an asset
- Extremely detail-orientated
- Good organizational and time-management capabilities
- Excellent interpersonal and verbal skills
- Self-motivated and flexible with a willingness to advance professionally

**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](mailto: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.*