



JOB TITLE: Client Reporting & Operations Analyst
DEPARTMENT: Client Reporting & Operations, Guardian Capital LP (“GCLP”) & Guardian Capital Advisors LP (“GCA”)
REPORTS TO: Supervisor, Client Reporting & Operations
LOCATION: Commerce Court West, 199 Bay Street, Toronto

JOB STATEMENT:

GCG has an immediate need for a Client Reporting & Operations Analyst. As part of a team of 4, the role’s main responsibilities are to provide support by producing reports and statements for distribution to GCA clients, as well as supporting the operation side of CRM (Client Relationship Management). This role is suitable for an individual in a similar role who has industry knowledge and experience, advanced Excel skills (can build macros, functions, pivot tables), MS Access skills and experience with the related systems.

ESSENTIAL FUNCTIONS:

Reporting –

- Assisting with the preparation and maintenance of reporting for high profile and sensitive clients;
- Documenting and reporting on all KPI and KRI, including error logs and SLAs;
- Generating the weekly and monthly reports for a specific set of GCA clients;
- Providing back-up for GCLP weekly and monthly reports for a specific set of clients;
- Working with internal stakeholders to develop, update, maintain and produce quarterly statements for clients, including inter-period calculations of closed accounts;
- Providing back-up for GCLP quarterly statement production; and
- Uploading client investment data to GCA’s website on a weekly basis, to be accessible by the clients.

Operations –

- Assisting with the development, updates, and maintenance of client information on the CRM system for all Guardian companies;
- Ensuring data inputted into the CRM meet quality control standards;
- Developing ‘canned reports’ for staff use;
- Working with internal stakeholders to ensure that they are effectively using the CRM systems;
- Working with the assigned Business Analyst to develop and maintain dashboards; and
- Performing other duties as assigned.

QUALIFICATIONS:

- University degree or equivalent
- Successful completion of the CSC course
- At least one to five years of experience in the securities industry
- Strong interpersonal and problem-solving skills
- Ability to meet deadlines and multi-task
- Advanced abilities in Microsoft products such as Excel and Access
- Demonstrated ability to work in a team environment

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.