



GUARDIAN CAPITAL | PRIVATE WEALTH

JOB TITLE: Team Leader, Administration
DEPARTMENT: Administration, Guardian Capital Advisors LP (“GCA”)
REPORTING TO: Manager, Investment Operations
LOCATIONS: Toronto, ON

JOB STATEMENT:

The incumbent will be responsible for leading the head office Operations team and supplying support, where needed, to GCA’s Administration teams by providing dependable administration services supporting Private Wealth clients, advisors, and portfolio administrators. Reporting to the Manager, Investment Operations, this experienced candidate will build and maintain successful relationships with all levels of staff as well as with external custodians and service providers.

ESSENTIAL FUNCTIONS:

- Managing the day-to-day administration for Guardian’s Private Wealth clients;
- Leading the head office Administration staff including, but not limited to, the underlying administration responsibilities such as reconciliation, management fees, trade settlements, corporate actions, and client reporting;
- Leading and coordinating the quarter-end process to ensure that deadlines are met and the client reports are generated accurately and proficiently;
- Providing management and analysis reports to senior management, as well as identifying other reporting needs;
- Assisting the Manager, Investment Operations with the development and execution of special projects and system improvements;
- Providing technical support to the portfolio managers in building and maintaining asset mix models to facilitate a streamlined process for investment decision-making; and
- Providing support on ad-hoc tasks as assigned.

JOB SPECIFICATIONS:

- Post-secondary education in business, computer science, math or economics
- Successful completion of the Canadian Securities Course
- Minimum of five to seven years similar experience within the investment industry
- Familiarity with compliance rules regarding the Private Wealth industry
- Advanced skills in Microsoft Excel (macros, functions, etc.), Access (building, repairing) and PowerPoint
- Experience using SS&C products especially Pacer, GWP Suite, Pages, PCView, and Recon
- Experience using Microsoft Dynamics as a CRM solution
- Previous leadership experience working in a team environment
- Strong communication, analytical and problem-solving skills
- Ability to multi-task and to communicate with all levels of staff
- Professional work ethic and a team player
- Willingness to take additional courses to improve skills 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.