GUARDIAN CAPITAL

JOB TITLE: Client Portfolio Manager
DEPARTMENT: Guardian Capital Advisors LP ("GCA")
REPORTS TO: Vice President, Portfolio Manager, Calgary
LOCATION: Calgary, Alberta

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. 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 in 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 has a dynamic opportunity for a motivated individual who desires working in a progressive, team-based financial services environment. For additional information, please visit https://www.guardiancapital.com/private-wealth-management/.

ESSENTIAL FUNCTIONS:

- Being a contributing team member where all aspects of prospecting, client servicing and portfolio management are done collaboratively within a smaller team;
- Building a strong rapport with our existing referral advisors and expanding our advisory referral network through showcasing our investment advisory services;
- Providing input and support for the development of new business initiatives;
- Managing client portfolios while working collaboratively with referring advisors;
- Understanding client needs and developing, and presenting an investment strategy;
- Executing on all components of portfolio management within a team framework to ensure consistency of a range of solutions and messaging, including but not limited to: portfolio construction, asset mix, asset allocation, cash management and trading;
- Identifying and communicating on issues related to markets, performance and all account characteristics;
- Having the creative ability to adjust the content of conversations to a range of different needs either directly or indirectly;
- Participating in active advisor and client engagement with timely messaging, portfolio reviews and portfolio rebalancing;
- Delivering high service standards to collect and confirm all relevant client documentation, including KYC of all clients to meet regulatory requirements;
- Managing a large volume of accounts while still maintaining a personal and customized investment solution; and
- Having the ability to be a contributor to improve processes to better serve our referring advisors.

QUALIFICATIONS:

- University degree – preferred major in business
- Chartered Financial Analyst
- Excellent understanding of financial markets and ability to communicate with clients of varying levels of financial sophistication

- Affinity to cultivating client and business development relationships
- 7+ years' experience performing research involving the financial analysis of investments
- 7+ years' experience servicing advisors and clients
- 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.