



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

JOB STATEMENT:

As part of the team focused on GCLP’s retail clients, the main responsibility of the Investment Services Coordinator is to support the Retail distribution team, client reporting and communications and to act in a liaison role with internal providers for 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:

- Assisting in the collection and ongoing maintenance of the client and prospect CRM database;
- Coordinating the creation and distribution of monthly and quarterly client reports with department executives;
- Managing travel plans for the Portfolio Managers;
- Assisting in the preparation of responses to client and consultant requests and inquiries;
- Drafting and maintaining client presentation materials;
- Coordinating and scheduling the production of marketing materials with internal teams;
- Assisting in the binding, assembling and distribution of presentations and 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
- Completion, or working towards, the CSC and/or CFA designation is an asset
- Extremely detail-orientated
- Bilingual (French) is an asset
- 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.

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.