



JOB TITLE: Bilingual Investment Solutions Associate
DEPARTMENT: Retail, Guardian Capital LP (“GCLP”)
REPORT TO: Senior Vice President, Head of Distribution
LOCATION: Toronto, ON

JOB STATEMENT:

GCLP has an immediate need for a bilingual Investment Solutions Associate to join our retail asset management team. As a member of this team, you will contribute to growing our business with new and existing clients as well as delivering industry leading service. Key facets of this role include supporting our senior sales team members with product and client support, building digital campaigns coupled with robust follow up including virtual meetings, phone calls and emails, as well as administrative functions relating to our CRM, webinars and coordination of key business activities.

ESSENTIAL FUNCTIONS (Bilingual):

- Supporting the senior sales team members by preparing and distributing special client reporting requests and preparing responses to requests from clients;
- Collaborating on digital campaigns;
- Assisting in the creation of campaigns;
- Preparing and analyzing reports of key findings and opportunities;
- Following up on opportunities with clients and prospects through virtual meetings, phone calls and emails;
- Fielding incoming calls and taking appropriate action to service client and prospect requests;
- Supporting ongoing maintenance as well as the collection of client and prospect details for the CRM;
- Assisting in the preparation of responses to requests from clients and consultants;
- Organizing and managing webinars;
- Drafting and maintaining client presentation materials; and
- Coordinating and scheduling the production of marketing materials with internal teams.

QUALIFICATIONS:

- Post-secondary degree (preferably with an orientation toward business, finance or communications)
- Fluent in English and French, both written and oral
- A minimum of 3 years of financial industry experience
- Strong Salesforce (or other CRM) knowledge is an asset
- 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.

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.