



JOB TITLE: Portfolio Analyst
DEPARTMENT: Guardian Partners Inc. (“GP”)
REPORTING TO: Chief Operating Officer
LOCATION: Toronto, Ontario

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. Guardian Partners Inc. is a multi-family office, often referred to as an Outsourced Chief Investment Officer. Our focus at GP is to work with ultra high net worth families, and endowments and foundations, to achieve their wealth goals. To a lesser extent, our clients also include pension plans, ideally related to our client base. Our clients are coast to coast and reside primarily in Canada. As a trusted advisor for families we work closely with our clients’ taxation, estate planning, and insurance advisors delivering a holistic solution and client experience. The goals of our endowment and foundation clients reach beyond investment returns and include social impact and social and societal good.

GP (<https://www.guardiancapital.com/gpi>) presents a dynamic opportunity for a motivated individual who desires working in a progressive, team-based financial services environment.

ESSENTIAL FUNCTIONS:

- Provide support to the Associate Wealth Manager team to assist in the managing of client relationships;
- Assisting in the preparation of customized portfolio strategy recommendations for clients, including Investment Policy Statement design, portfolio/manager structure and the selection of investment managers;
- Conduct qualitative and quantitative analysis of each client's individual portfolio;
- Assist the Investment Counsellor in the preparation for client meetings/presentations;
- Prepare implementation plans for each client and effectively liaise with the administrative team to ensure that strategies are implemented with timeliness and accuracy; and
- Assist in special projects relating to investment manager research, business development and client relationship management.

JOB SPECIFICATIONS:

- University degree – preferred major in business
- Chartered Financial Analyst candidate preferred
- 0-3 years’ experience in the financial industry
- Strong analytical and problem solving skills
- Excellent written and verbal communication skills
- Strong time management and interpersonal skills
- Understanding the team culture, and leverage the offering 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.