

## **JOB OPPORTUNITY**

Position: Supervisor, Client Service  
Reporting to: SVP, Client Service & Business Development  
Term: Full time  
Location: 20 Eglinton Ave West, Toronto  
Start date: Winter 2024

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### **Overview**

The Client Service Supervisor will be responsible for managing and leading all day-to-day operations for the Institutional client service associates, while executing their own associate-related duties. The supervisor will be the go-to individual and point person for any challenges that the associates face while executing their tasks. The supervisor will advocate for, mentor, and lead the associates on an on-going basis, while reviewing and providing feedback on their work. They will work closely with Portfolio Managers, Relationship Managers, the IT team, the Marketing team, and the VP of Strategic Initiatives.

### **Key Responsibilities**

- Handle clients as a Client Service Associate.
- Support Institutional Dept objectives through leadership and supervision of the Associate group.
- Regular assessment and management of workload distribution within the Associate group.
- Responsible for day-to-day operations for the Client Service Associate group by participating in the hiring, onboarding, and training of new associates.
- Communicate any pertinent information regarding project timelines, goals, or objectives to team members and provide hands-on direction for all activities and projects.
- Create a collaborative and effective work environment for all associates and provide coaching and back-up when necessary.
- Ensure adequate coverage through coordination of vacation and other Associate absences.
- Ad-hoc review of associates' work for quality control.
- Prepare, maintain, and update knowledge-based documents and manuals related to institutional client service procedures.
- Coordinate Satuit enhancements with IT staff.
- Collaborate with other departments at BG on projects and any issues that may arise.
- Become familiar with Beutel Goodman's investment approach and the firm strategy.

### **Requirements**

- Solid understanding of the financial industry is required.
- Undergraduate degree in business or finance and general knowledge of financial industry.
- Develop and foster a positive and healthy team environment.
- Knowledge of investment account processes, laws & regulations.
- Strong analytical and problem-solving skills.
- Attention to detail.
- Excellent verbal and written communication skills.

- High level of proficiency with Microsoft Excel, PowerPoint, and Outlook.
- Knowledge of Portfolio Management tools and CRM.
- Quick learner with good aptitude for numbers.
- Team player with a positive attitude.

To apply, send your resume to [careers@beutelgoodman.com](mailto:careers@beutelgoodman.com)