

JOB OPPORTUNITY

Position: **Associate, Private Client Group**
Reporting to: Managing Director, Private Client Group
Term: Full time
Location: 20 Eglinton Ave West, Toronto

Overview

The Associate will work with Portfolio Managers in support of high-net-worth clientele within the Beutel Goodman Private Client Group (PCG). The Associate will be a key client contact on administrative matters and will be responsible for providing timely and high-quality service.

Key Responsibilities

- Onboard new accounts and ensure that all mandatory documentation is organized and complete
- Maintain ongoing client documentation to comply with regulatory requirements and internal compliance procedures
- Maintain account-related information in the CRM database
- Assist in the trading and settlement process for client accounts
- Respond to inquiries from clients, custodians and coworkers in a timely and professional manner
- Assist in production of periodic (monthly/quarterly) and ad hoc client reports, presentations and projects
- Perform related duties as assigned
- Support the team with a variety of daily tasks, special initiatives and projects.
- Resolve reconciliation issues that arise from cash balances and asset positions with custodial records

Requirements

- Bachelor's degree in accounting, finance, or related area of study
- At least five years of administrative and/or client service experience within the financial industry
- Experience with different types of investment accounts
- Excellent verbal and written communication skills
- Completion of CSC or IFIC course strongly preferred
- Proficiency with Microsoft Excel, PowerPoint and Outlook
- Knowledge of SS&C Pacer program, *preferred*
- High data input accuracy and exceptional **attention to detail**
- Ability to prioritize tasks and work well under pressure to meet tight deadlines
- Strong personal initiative combined with excellent analytical and problem-solving skills
- Team player with a positive attitude
- Personal trading experience preferred

- Ability to maintain confidentiality
- Keen interest in financial markets

This posting is for a current vacancy on our **Private Clients** team. To apply, send your resume to careers@beutelgoodman.com.

If you require any accommodations during the recruitment process, please email us at hr@beutelgoodman.com. A member of our HR team will reach out to you.