BEUTEL GOODMAN
Investment Counsel

JOB OPPORTUNITY

Position: Associate, Institutional Client Service

Reporting to: Supervisor, Institutional Client Service

Term: Full-time

Location: Toronto, Ontario

Overview

The Associate, Institutional Client Service position contributes to the success of the company's business development and client servicing activities by liaising with the company's clients, consultants and prospects while providing administrative support to the senior Institutional Client Service/Business Development team members. They will establish a strong collaborative relationship with peers by proactively sharing useful information and ideas to improve the team's functioning, while serving as a reliable point of contact for Relationship Managers.

Key Responsibilities

- Prepare monthly and quarterly customized reports for institutional clients and consultants, ensuring accuracy, consistency and timeliness
- Serve as a reliable point of contact for Relationship Managers and contribute to the development of strong, long-term relationships with assigned institutional clients
- Complete the opening of new accounts by coordinating the documentation and implementation of new portfolios with the relevant departments (portfolio administration, compliance, portfolio managers); efficiently manage the client onboarding process, including anti-money laundering and anti-terrorist checks
- Create client presentations for portfolio reviews, ensuring that it has gone through a quality control process before the final review by the Relationship Manager
- Record and update client contacts and other related information in Satuit (CRM system), ensuring data integrity and accuracy
- Complete quarterly, semi-annual and annual due diligence questionnaires for clients, as required
- Oversee that all documents received from clients and consultants comply and adhere with the company's approved standards
- Facilitate modifications in investment policies for each account (update appropriate systems, advise and follow-up with the various internal stakeholders)
- Collaborate with other members of the team on common projects and process enhancements, and provide back-up to other Client Service Associates when necessary
- Answer various queries from clients and prospective clients, as well as their accountants or consultants, including, instructions for contributions, withdrawals, or transfers; requests for statements or portfolio reports; tax-related questions; requests for new account openings; general questions about the firm and our services

- Understand Beutel Goodman's investment approach and stay abreast of the firm's strategy
- Work with sub-advisory clients' product and wholesaling teams to provide content and talking points for the successful marketing of BG mandates
- Participate in the training of new colleagues, as necessary

Requirements

- Undergraduate degree in business or finance, or related field, and general knowledge of the financial industry
- A customer-focused mindset with the ability to anticipate client needs and exceed expectations
- Experience in the financial services industry
- Detail-oriented and highly organized, and ability to manage multiple tasks and prioritize effectively in a deadline-driven environment
- Excellent interpersonal skills, with the ability to develop strong relationships with internal stakeholders and work collaboratively across departments
- Advanced problem-solving skills and strategic foresight with the ability to proactively identify and address the Relationship Managers' needs before they arise and mitigate issues in advance
- High level of proficiency in MS Office Suite: Outlook, Excel, Word, PowerPoint
- Proficiency in working with a CRM database would be considered an asset

This posting is for a current vacancy on our **Institutional Business Development and Client Servicing** team. To apply, send your resume to careers@beutelgoodman.com.

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