BEUTEL GOODMAN
Investment Counsel

**JOB OPPORTUNITY**

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| **Position:** | Portfolio Manager, Private Client Group |
| **Reporting to:** | Managing Director, Head of Private Client Group |
| **Term:** | Full-Time |
| **Location:** | 20 Eglinton Ave West, Toronto |

## About Beutel Goodman

Beutel Goodman is one of Canada's oldest independent investment management firms, managing assets on behalf of private clients, foundations, endowments, pension plans, and Indigenous communities. Our disciplined, long-term value investing approach and commitment to exceptional client service have earned the trust of clients for generations.

## Position Overview

As a **Portfolio Manager, Private Client Group**, you will be responsible for cultivating, managing, and growing relationships with high-net-worth individuals, families, foundations, endowments, and Indigenous communities.

This role is ideally suited to an experienced investment professional who combines strong relationship management skills with deep investment knowledge. You will serve as a trusted advisor to clients, helping them achieve their long-term financial objectives through thoughtful portfolio construction, disciplined investment management, and exceptional client service.

Working closely with Beutel Goodman's investment teams, you will provide clients with informed perspectives on portfolio strategy, market developments, and investment performance. You will translate complex investment concepts into meaningful discussions that help clients make confident, informed decisions.

The successful candidate will bring both the ability to develop new relationships and the maturity to maintain and deepen existing client relationships over the long term. They will be recognized as a trusted partner whose credibility is founded on investment expertise, sound judgment, and an unwavering commitment to client success.

## Key Responsibilities

### Client Relationship Management

- Serve as the primary relationship manager for a portfolio of high-net-worth clients.
- Build, maintain, and deepen trusted relationships through proactive engagement and exceptional service.

- Lead comprehensive client discovery discussions to understand each client's objectives, priorities, constraints, and risk tolerance.
- Prepare and maintain Investment Policy Statements aligned with client goals and circumstances.
- Conduct regular client meetings to review portfolio positioning, performance, and progress toward long-term objectives.
- Provide thoughtful guidance and timely communication during changing market conditions.

**Investment Management**

- Communicate Beutel Goodman's investment philosophy, portfolio strategy, and risk management approach in a clear and meaningful manner.
- Demonstrate a strong understanding of portfolio construction, asset allocation, capital markets, and investment principles.
- Participate in discussions with investment teams regarding portfolio positioning, investment ideas, and market developments.
- Contribute investment insights and perspectives to support client discussions and relationship management activities.
- Ensure client portfolios remain aligned with investment objectives and applicable regulatory requirements.

**Business Development**

- Develop new client relationships through professional networks, referrals, centres of influence, and community engagement.
- Identify opportunities to expand existing client relationships and deliver additional value to clients and their families.
- Represent Beutel Goodman in meetings, presentations, and industry events.
- Develop and maintain strong relationships with professional advisors and centres of influence.

**Team Collaboration**

- Collaborate closely with associates, administrators, and investment professionals to deliver an exceptional client experience.
- Contribute to a culture of teamwork, professionalism, and client-centered service.
- Support the continued growth and success of the Private Client Group.

**Requirements**

- Minimum 10 years of relevant investment industry experience.
- Experience managing discretionary portfolios and/or advising high-net-worth clients.
- Undergraduate degree in business, commerce, finance, economics, or a related field.
- CFA designation or equivalent investment credentials strongly preferred.
- Ability to register as an Advising Representative with the applicable provincial securities regulators.

- Demonstrated understanding of portfolio construction, asset allocation, security analysis, and capital markets.
- Strong business development skills with a proven ability to build and grow meaningful client relationships.
- Exceptional communication and presentation skills.
- High degree of personal integrity, professionalism, and sound judgment.

This posting is for a current vacancy on our Private Client Group team.

To apply, please click here.

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