

JOB OPPORTUNITY

Position: Associate, Private Client Group
Reporting to: Manager, Private Client Group
Term: Full-Time
Location: 20 Eglinton Ave West, Toronto

Overview

The Associate will work closely with Portfolio Managers to support high-net-worth clients within the Beutel Goodman Private Client Group (PCG). As a key contact for administrative matters, the Associate will provide timely, accurate, and professional support while exercising sound judgment and protecting confidential information. The successful candidate will combine a client-first mindset, strong technical knowledge, attention to detail, and a collaborative, proactive approach to deliver a seamless client experience.

Key Responsibilities

- Provide exceptional client service through professional and timely communication
- Prepare accurate client presentations, reporting packages, and other client-facing materials
- Coordinate new account openings, including documentation, approvals, and system setup
- Manage account transfers and changes from initiation through completion
- Coordinate cash management, contributions, withdrawals, recurring payments, and related trade or settlement follow-up
- Review transactions, reconciliations, and corporate actions, investigating and escalating issues promptly
- Collaborate effectively with Portfolio Managers, Associates, custodians, and internal teams
- Provide reliable coverage, share knowledge, and support Portfolio Managers and colleagues with daily priorities, process improvements, and special projects
- Use approved AI and automation tools responsibly to improve efficiency while maintaining confidentiality, accuracy, and appropriate oversight

Requirements

- Post-secondary education in business, finance, accounting, economics, or a related discipline
- Experience in wealth management, investment administration, banking, or financial services
- Excellent client service, communication, and interpersonal skills

- Demonstrated organizational skills, attention to detail, and ability to manage competing priorities
- Discretion when handling confidential client and firm information
- Integrity, sound judgment, and a commitment to clients' best interests
- Commitment to collaboration, respectful communication, and supporting colleagues
- Initiative, analytical thinking, and practical problem-solving skills
- Proficiency in Microsoft Excel, PowerPoint and Outlook
- Completion of the Canadian Securities Course (CSC) or Investment Funds in Canada (IFIC) course is strongly preferred

This posting is for a current vacancy on our Private Client Group team. To apply, please click [here](#).

The base annual salary range for this role is \$70,000–\$85,000.

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.