



GUARDIAN CAPITAL

JOB TITLE: Client Reporting and Operations Analyst
DEPARTMENT: Guardian Capital Group Limited (“GCG”)
REPORTS TO: Supervisor, Client Reporting & Operations
LOCATION: Commerce Court West, 199 Bay Street, Toronto

JOB STATEMENT:

GCG has an immediate need for a Client Reporting and Operations Analyst. This role’s main responsibilities are to provide support for the distribution of reports and statements to the clients of Guardian Capital Advisors LP (“GCA”), and to provide support to the operations side of the Client Relationship Management (“CRM”) system. This role is suitable for an individual in a similar role who has industry knowledge and experience, advanced Excel skills (can build macros, functions, pivot tables), MS Access skills and experience with the related systems.

ESSENTIAL FUNCTIONS:

Reporting –

- Working with internal stakeholders to develop, update, maintain and produce quarterly statements for clients, including inter-period calculations of closed accounts;
- Leading the preparation, generation, and distribution of client reporting for high net worth clients;
- Documenting and reporting on all KPI and KRI; including error logs and SLAs;
- Generating the weekly and monthly reports for a specific set of GCA clients;
- Providing back up for the weekly and monthly reports for a specific set of Guardian Capital LP (“GCLP”) clients;
- Providing back up for GCLP’s quarterly statement production; and
- Uploading client investment data to GCA’s website on a weekly basis, to be accessible by the clients.

Operations –

- Assisting with the development, updates and maintenance of client information on the CRM for all Guardian companies;
- Ensuring quality control data inputs into the CRM;
- Developing custom reports in the CRM for admin and executive staff;
- Working with internal stakeholders to ensure that they are effectively using CRM; and
- Working with the assigned Business Analyst to develop and maintain dashboards in CRM.

Other Duties –

- Assisting with other duties and initiatives, as requested.

QUALIFICATIONS:

- Post-secondary education
- Successful completion of the Canadian Securities Course
- 1 to 5 years of experience in the securities industry
- Ability to meet deadlines and multi-task
- Strong interpersonal and problem-solving skills
- Advanced abilities in Microsoft Office products
- Experience with CRM systems such as Salesforce would be an asset
- Experience with SS&C products such as Pages and Pacer would be an asset
- Programming knowledge of VBA or SQL would be an asset
- Demonstrated ability to work in a team environment

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@guardiancapital.com.

Guardian is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Guardian will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.

We thank all applicants for their interest but only those selected for an interview will be contacted.