

**JOB TITLE:** Business Analyst  
**DEPARTMENT:** Guardian Partners Inc. (“GPI”) and Guardian Capital Advisors LP (“GCA”)  
**REPORTING TO:** President  
**LOCATION:** Toronto, Ontario

### **JOB STATEMENT:**

Guardian Capital Group Limited (“GCG”) is a diversified financial services company which serves the needs of clients ranging from private clients to institutions. Guardian Private Wealth includes the business of Guardian Partners Inc. and Guardian Capital Advisors. GPI is an Outsourced Chief Investment Officer for endowments and small pension plans, as well as a Private Investment Office for ultra high net worth families. GPI’s expertise in research allows it to engage with best of breed investment strategies in all asset classes domestically and abroad for client portfolios. GCA, is a dynamic and rapidly growing wealth management firm with a focus on high net worth individuals and families. GCA utilizes the global investment strategies of GCG for constructing diversified client portfolios

Our clients are primarily in Canada, but also into the US and Caribbean. As a trusted advisor for families we work closely with our clients’ taxation, estate planning, and insurance advisors delivering a holistic solution and client experience. The goals of our endowment clients reach beyond investment returns and include social impact, governance, and programs for societal good. GCA and GPI manage in excess of \$8B in assets on behalf of clients.

See <https://www.guardiancapital.com/private-wealth-management> and <https://www.guardiancapital.com/gpi> for more information.

### **ESSENTIAL FUNCTIONS:**

- Coordinating and consolidating business opportunities across GPI and GCA;
- Preparing competitor analysis and collecting market intelligence;
- Building a RFP database and assisting with RFP and RFI responses;
- Conducting research on prospective clients;
- Coordinating with marketing, finance and compliance/legal as it relates to supporting business development activities and building collateral;
- Facilitating periodic meetings that bring together the senior team to ensure best practices, strategies and information is being disseminated across the wealth team;
- Assisting with branding and strategic initiatives, including collaboration on the development of marketing materials such as brochures, pitch presentations, etc.;
- Identify and propose process improvements in the communication with clients, centers of influence and prospects; and
- Assist in developing client engagement programs including email campaigns, event coordination and social media.

### **JOB SPECIFICATIONS:**

- University degree – preferred major in business
- 3+ years’ experience in the financial industry, preferably the private wealth business
- Experience building databases and proficient with Salesforce
- Strong analytical and problem solving skills
- Excellent written and verbal communication skills
- Strong time management and interpersonal skills
- Understanding the team culture, and leverage the offering of GCG as required

## **COMPENSATION:**

Commensurate with experience

*If you are interested in applying for this position, please forward a cover letter and resume in confidence to [careers@guardiancapital.com](mailto:careers@guardiancapital.com).*

*Guardian Capital 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 Capital 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.*