



JOB TITLE: Portfolio Analyst
DEPARTMENT: Guardian Capital Advisors LP (“GCA”)/Private Wealth
REPORTS TO: Client Portfolio Managers
LOCATION: Toronto, ON

JOB STATEMENT:

Guardian Capital Group Limited (“GCG”) is a diversified financial services company that serves the needs of clients within the financial services sector. GCA, a subsidiary of GCG, provides customized investment solutions to high net worth clients. GCA (<https://www.guardiancapital.com/private-wealth-management>) has a dynamic opportunity for a motivated individual who desires working in a progressive, team-based financial services environment.

ESSENTIAL FUNCTIONS:

- Working proactively with client portfolio managers to implement client based initiatives;
- Interacting with clients and referral agents directly to solve complex problems in order to maintain and strengthen relationships;
- Supporting in the management of client accounts, including cash management, trading, asset allocation, as well as providing investment recommendations;
- Becoming a subject matter expert on existing systems, while also look to improve operations by building new systems in MS Excel, GWP Suite, Refinitiv, Salesforce and others;
- Assisting in the preparation of client marketing presentations, proposals, questionnaires and data requests; and
- Developing and assisting in the local marketing and sales plan.

QUALIFICATIONS:

- Post-secondary education
- At least hold a CIM designation with relevant work experience and/or completed CFA Level 1
- A minimum 3 years of meaningful work experience, in the financial services industry with a focus on investment analysis and/or mid or front office support
- Self-motivated, independent individual with the dedication to perform
- Excellent interpersonal, communications and collaboration skills
- Professional, polished presentation
- Proficient in Microsoft Office, including Word, Power Point, Excel (macros, VBA skills is an asset)

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.

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.