



JOB TITLE: Client Reporting & Operations Analyst (2 Positions)
DEPARTMENT: Client Reporting & Operations, Guardian Capital Group (“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 & Operations Analyst. This role’s main responsibilities are to provide support in creating reports and statements for distribution to Guardian Capital Advisors LP (“GCA”) or Guardian Capital LP (“GCLP”) clients, as well as to provide support for the operational side of 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, and pivot tables), MS Access skills and experience with 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 with the preparation and maintenance of reporting for high profile and sensitive 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 or GCLP clients;
- Providing back up for the weekly and monthly reports for a specific set of GCA or GCLP clients;
- Providing back up for GCA or GCLP’s quarterly statement production; and
- Uploading client investment data to GCA’s website on a weekly basis, to be accessible by clients.

Operations -

- Assisting with the development, updating, and maintenance of client information on the CRM system 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.

Other duties -

- Assisting with other duties and initiatives, as requested.

QUALIFICATIONS:

- University degree or equivalent
- Successful completion of Canadian Securities Course
- 1 to 5 years of experience in the securities industry
- Strong interpersonal and problem-solving skills
- Ability to meet deadlines and multi-task
- 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 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.