Investment Associate – Victoria

This year, Odlum Brown celebrates its 97th anniversary as an independent, employee-owned, full-service investment firm. We are honoured to be recognized as one of Canada's Best Managed Companies for 21 consecutive years and as one of Canada's Most Admired™ Corporate Cultures.

CULTURE AND VALUES
We are very proud of the vibrant culture that we have built and sustained for many years. It's the way we do things, how we make decisions and what defines which behaviours work and don't work – it's what makes up our DNA.

Our values are the cornerstone of our culture, a set of principles that provide a compass for our actions and unify us as a team.

PEOPLE
We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers and every other variety of person you can imagine. You will work with really interesting people and make great friends, too.

COMMUNITY
We are serious about supporting the communities where we live and work. We are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT
Continuous learning matters. We are committed to providing career-long support for learning and growth.

We currently have an opportunity for an Investment Associate to join our award-winning firm in the Victoria office.

In this role you will work directly with the Portfolio Manager with a focus on servicing and growing the discretionary portfolio management business. There is an opportunity for profit-sharing and advancement within the Portfolio Manager's business.

KEY AREAS OF RESPONSIBILITY
- Develop investment strategies and manage portfolios in collaboration with the Portfolio Manager.
- Provide clients with financial and investment advice under the guidance and direction of the Portfolio Manager.
- Maintain customer relationship software records and compile reports.
- Contribute to the growth and development of the business using various marketing initiatives.
- Prepare communication and correspond with clients and prospective clients.
- Plan and coordinate client events.

COMPETENCIES AND PERSONAL ATTRIBUTES
- Proven ability to establish trust and build long-term relationships with clients.
- Confident reaching out to prospective clients and recognizing referral opportunities within existing client base.

- Genuine willingness to invest the time required to understand clients' needs and expectations.
- Committed to continually developing the knowledge and expertise required to contribute optimal value for clients.
- Demonstrates personal drive – self-directed, motivated and approaches the role with energy and the determination to succeed.
- Effectively juggles multiple and competing priorities.
- Operates with intensity, energy and enthusiasm.
- Highly disciplined with an orientation to getting things done.
- Regularly contribute high-quality thinking to the development of ideas to expand the portfolio.

EDUCATIONAL BACKGROUND AND QUALIFICATIONS

- Currently IIROC licensed or licensable, having completed the Canadian Securities Course (CSC) and the Conduct and Practice Handbook (CPH).
- Minimum three years of related experience within the investment industry.
- Solid working knowledge of MS Suite of programs.

If you are up for the challenge and have the credentials and/or experience for this role, we invite you to submit a cover letter and resume to **hr@odlumbrown.com** by **October 16, 2020.**

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.