



Investment Associate – Vancouver (Job Requisition 1000-3)

WHO WE ARE

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for over 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant, ever-evolving culture that we have built over the years. These values are the cornerstone of our culture and the 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 – all with diverse backgrounds and experiences to share from around the globe. 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. A recipient of a Canada's Volunteer Award from the Government of Canada, 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.

THE OPPORTUNITY

We have an opportunity for an Investment Associate to join our award-winning firm in our Vancouver office, where you'll be working in a three-person team with Cameron McLeod Wealth Management.

WHAT YOU'LL DO

In this role, you will work directly with a results-oriented team of investment professionals who are focused on providing exceptional client experience with a focus on discretionary portfolio management and holistic wealth services to individuals, investment corporations, trusts, and non-profit organizations. This position offers competitive compensation, a collaborative work environment and an opportunity to grow and develop in the industry.

RESPONSIBILITIES

- Analysis
 - Conduct research on markets and investments; provide regular updates to the team
 - Update investment model spreadsheets
 - Support the team with trading and portfolio rebalancing
 - Update slide decks for client meetings/presentations
 - Assist with quarterly letters and reviews



- Financial Planning Support
 - Support clients through the wealth management process by gathering relevant information, documents, and questionnaires, coordinate activities with appropriate financial planning contacts and follow-up on tasks
 - Liaise with clients' accountants for year-end tax filing
 - Identify opportunities for clients to minimize taxes through appropriate strategies
 - Maintain up to date records of clients' net-worth and cash flow statements
- Administration
 - Work with internal departments to provide client support
 - Respond to client inquiries in a timely manner by email, phone and in-person communication
 - Assist with new client onboarding
 - Ensure client files and documentation are accurate and up to date using Salesforce CRM
- Marketing/Business Development
 - Support the team with marketing material, website updates and client thought pieces
 - Identify opportunities among the existing client base for asset consolidation and referrals
 - Help manage a pipeline of prospects/leads to close new opportunities
 - Deepen existing relationships with Centers of Influence (COIs) through ongoing engagement
 - Develop strong internal/external networks for potential referral sources

COMPETENCIES

- *Advising & Coaching* – Able to assess stakeholder needs and provide tailored advice for resolving standard challenges, recommend practical solutions based on experience and existing knowledge and foster trust by maintaining open communication and ensuring stakeholder concerns are addressed
- *Business Development* – Able to independently qualify leads and assess their alignment with target markets or customer segments, build relationships with prospective clients and effectively communicate value propositions and contribute to proposals and pitches that address client needs and support revenue growth
- *Customer Relationship Management* – Able to effectively manage and nurture a portfolio of client relationships, ensuring long-term satisfaction and retention, leverage CRM tools to analyze client data and deliver tailored, consistent service and identify trends and insights to anticipate client needs and drive relationship growth
- *Financial Planning* – Able to generate standardized financial plans that address client needs and objectives, identify and recommend financial products to meet specific needs and explain planning recommendations to clients clearly and effectively
- *Investment & Portfolio Management* – Able to support or manage simple investment accounts and/or portfolios with occasional guidance for more complex transactions, effectively analyze and report on portfolio performance and understand opportunities to optimize investment strategies and form simple recommendations
- *Regulatory Knowledge* – Able to interpret and apply complex regulations to organizational processes and practices, act as compliance lead for specific domains, projects or teams and recommend actions to mitigate regulatory or legal risk, evaluate and improve internal processes and practices to ensure ongoing legal and ethical compliance
- *Risk Assessment* – Able to independently assess and address standard risks, recommend, and implement basic risk mitigation strategies, identify actions or events that conflict with the intent of professional standard, risk or regulatory frameworks



KNOWLEDGE AND EXPERIENCE

- Minimum of 3 years of experience within the investment industry
- Registered with CIRO as a Registered Representative in good standing
- Pursuing or in possession of industry-recognized designations (e.g., CFA, CFP or CIM®)
- Intermediate to advanced knowledge of Microsoft 365 with a focus on Excel and VBA coding
- Knowledge of Broadridge's Dataphile and/or Salesforce is an asset
- Strong verbal and written communication and presentation skills
- Strong analytical and organizational skills, with the ability to manage multiple priorities
- Detail oriented, delivering high quality work
- Disciplined, driven and operates with a high level of accountability

WHAT WE OFFER

A culture of openness, collaboration and respect is foundational to our firm. We are a diverse, driven group of individuals who genuinely care about one another and encourage and appreciate each other's contributions. We believe in rewarding team members and do this by providing a competitive total rewards package that is fair and equitable; mentorship programs; flexible work options; and a variety of professional development opportunities to expand your career. This role has an expected salary and commission range of \$75,000 - \$95,000/year, plus the potential for bonuses.

Our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this role, we invite you to submit a cover letter and resume (quoting job requisition 1000-3) to careers@odlumbrown.com by **June 27, 2025**.

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.