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Letko, Brosseau & Associates Inc.

Director, Investment Services

Letko, Brosseau & Associates is an investment manager with offices in Montreal, Toronto and Calgary. Founded in 1987, the firm has enjoyed strong growth as a result of excellent investment performance, attentive client service and high standards of business ethics.

The primary focus of the Director, Investment Services is to help our clients to better understand the full potential of our services and act as liaison between the client and the company.

The Director, Investment Services will maintain existing business and grow business relationships with current clients. The candidate will also be responsible for collaborating with different work groups and departments to improve customer support programs and enhance customer satisfaction and engagement. The Director, Investment Services may also bring or assist in bringing new clients on board.

Main responsibilities:

Client relation:

- Become the reliable point of contact for each customer that is required to establish a strong business relationship;
- Ensure clients stay satisfied and positive;
- Develop a rapport with each client and enhance/expand relationships;
- Develop open and effective channels of communication with each client that can be employed by other departments as well.

Business Development:

- Encourage revenue growth by inspiring clients to purchase additional services or expand existing services;
- Arrange and participate in internal and external client debriefs;
- Ensure all team members represent the company in the best light;
- Coordinate internal projects and determine the best utilization of resources to increase customer satisfaction.

Day-to-day responsibilities:

- Provide regular updates to clients on the progress of their portfolios through printed material, emails, telephone and in person presentations;
- Inform clients on the firm's progress, customer service projects and campaigns that directly affect each client;
- Account review KYC;
- Assess, recommend changes to and consult on investment policies;
- Monitor client transactions and ensure compliance;
- Receive new clients, fulfill KYC requirements and assess investment needs;
- Keep up to date on investment strategies of the firm and speak fluently about such.

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Required profile:

- University degree in Finance, Economics or related discipline; prefer MBA/MS;
- Minimum of 7 years of experience in a similar position (Portfolio Manager, Client Relationship Manager, etc.) in investment banking, trading, counseling industry;
- CIM designation, and/or CFA charterholder, an asset;
- Bilingualism both spoken and written (English and French), an asset.

The ideal candidate:

- Has exceptional analytical and financial analysis skills. Has strong macro capital markets background;
- Has an impeccable client approach;
- Meet OSC, AMF and other provincial requirements to register as an investment advisor;
- Ability to summarize research reports and identify key ideas in the overall investment thesis;
- Strong analytical and problem-solving skills;
- High attention to detail;
- Excellent oral communication and presentation skills;
- Ability to learn new skills and acquire new knowledge.

Salary and Benefits:

- Very attractive and competitive base salary, plus annual bonus;
- Generous medical, dental and life insurance as well as long-term disability insurance plans as of day one;
- Employer contribution to a deferred profit-sharing plan (DPSP).

Our mission is to provide a supportive and inclusive environment where all individuals can maximize their full potential.

If you are interested in the challenge, please submit your resume to **careers@lba.ca.**

We thank all candidates for applying, however only those selected for an interview will be contacted.