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Letko, Brosseau & Associates Inc.

Director, Investment Services

Letko, Brosseau & Associates is one of Canada's leading independent investment management firms, serving both institutional and high net worth clients. The firm's approach is based on fundamental analysis, broad diversification, an international perspective, careful security selection and low turnover. The strength and depth of our industry research and corporate analytical work, together with rigorous adherence to investment principles, have generated solid long-term results for clients since the firm's foundation in 1987.

The primary focus of the Director, Investment Services is to serve as our clients' trusted advisor. He or she will be the primary point of contact for a group of institutional and private clients. The individual will be responsible for reviewing asset mixes and investment policies, explaining portfolio decisions and discussing the firm's investment outlook.

The Director, Investment Services will maintain and grow existing client relationships. Moreover, the individual will be working with different departments to improve customer support programs as well as customer satisfaction and engagement. The Director, Investment Services may also assist in bringing new clients on board.

Main responsibilities:

<u>Managing client relationships</u>

- Serve as a reliable point of contact and build rapport with assigned clients to establish strong business relationships
- Stay abreast of the firm's investment strategy, its outlook on the economy and capital markets
- Regularly communicate with clients, prospects, and intermediaries in order to share the firm's investment strategy, philosophy and outlook on the economy and capital markets
- Review investment policies and asset mixes and recommend changes if necessary
- Provide regular updates to clients on their portfolios' progress via documents, emails, telephone and in-person presentations
- Answer client queries on their holdings, the firm's investment strategy, economic outlook, or other matters affecting their portfolios
- Process and monitor client transactions, and ensure their compliance
- Liaise with custodians, accountants, consultants and other parties on behalf of clients
- Know your client (KYC) account review
- Contribute to revenue growth by developing a network of referrals
- Meet new clients, fulfill KYC requirements and assess investment needs

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Required profile:

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

Ideal candidate qualifications:

- Strong analytical and financial analysis skills and experience in capital markets
- Impeccable client approach
- Meet OSC, AMF and other provincial requirements to register as an investment advisor
- Ability to summarize research reports and to identify key ideas in the overall investment thesis
- High attention to detail
- Excellent oral communication and presentation skills
- Ability to learn new skills and acquire new knowledge

Salary and benefits:

- Highly competitive base salary plus annual bonus
- Medical, dental and life insurance coverage, along with long-term disability insurance
- Employer contribution to a deferred profit-sharing plan (DPSP)

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

If you are ready for this 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.