



Letko, Brosseau & Associates Inc.

Associate, Investment Services (Montréal)

Letko, Brosseau & Associates is one of Canada's leading independent global investment managers. Founded in 1987, the firm offers a diverse set of investment solutions to a domestic and international customer base. We believe our business-minded, fundamental research approach, strong ethical culture and client-first fiduciary commitment has been the key to our long-term growth and success. Through ongoing, active engagement with the companies we invest in, we seek to contribute to positive change, while earning superior returns for our clients.

Our Investment Services team is responsible for all aspects of the firm's interaction with our customers. This includes communicating our investment views, as well as processing clients' instructions and responding to their various requests for information. The team is also in charge of developing relationships with prospective investors.

We are seeking a bilingual and highly professional individual to assist an Investment Counsellor in maintaining and growing existing client relationships, as well as onboarding new clients. Serving a group of private and institutional customers, the Associate will be their primary point of contact for all administrative matters pertaining to their accounts.

As an integral member of the team, the Associate will also actively participate in various initiatives aimed at continuously improving customer satisfaction and engagement.

Main responsibilities:

- Coordinate the Investment Counsellor's meetings with existing or prospective clients and prepare all required presentation material in a timely manner.
- Answer various email and telephone queries from clients and prospective clients, as well as their accountants or consultants, including:
 - Instructions for contributions, withdrawals, or transfers
 - Requests for statements or portfolio reports
 - Tax-related questions
 - Requests for new account openings
 - General questions about the firm and our services
- Complete account opening documentation and efficiently manage the client onboarding process.
- Obtain ongoing account documentation from clients and maintain up-to-date client files, as per regulatory and compliance requirements.
- Regularly liaise with custody companies and with other departments of the firm such as accounting, trading or compliance with regards to various client matters.
- Establish a strong collaborative relationship with peers by proactively sharing useful information and ideas to improve the team's functioning.
- From time to time, participate in the training of new colleagues that join the team.
- Familiarize yourself with Letko Brosseau's investment approach and stay abreast of the firm's strategy.
- Perform various day-to-day administrative tasks.

LetkoBrousseau

Required qualifications:

- College or undergraduate university degree, ideally in business administration or a related field
- Completion of the Canadian Securities Course (CSC®), an asset
- Minimum of five years of experience working in the financial services industry
- Bilingualism, both spoken and written (English and French)
- Proficiency with Microsoft Office and ease in learning new IT tools, such as portfolio management systems and client relationship management databases

Ideal candidate qualifications:

- Strong focus on customer service excellence
- Good communication and interpersonal skills
- Excellent organization, multitasking and priority management skills
- Resourcefulness, problem-solving skills and ability to work autonomously
- High attention to detail
- Team spirit and ability to thrive in a collaborative work environment

Salary and Benefits:

- Highly competitive base salary, plus annual bonus plan
- Employer contribution to a deferred profit-sharing plan (DPSP)
- Immediate access to medical, dental and life insurance coverage, along with short-term and long-term disability insurance
- Employee and family assistance programs and telemedicine

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.