

## Asset Mix Associate

**Connor, Clark & Lunn Private Capital Ltd.**  
**Vancouver, BC**

Connor, Clark & Lunn Financial Group provides investment management services to individuals, advisors, pension plans, institutional investors and foundations. As a multi-boutique asset management firm, Connor, Clark & Lunn Financial Group is uniquely focused on creating the conditions for success for its clients, partners and employees. The firm has offices in Vancouver, Edmonton, Calgary, Regina, Toronto, Ottawa, Montreal, and London, UK and through its affiliated investment managers is responsible for the investment of over \$80 billion in assets under management.

**Connor, Clark & Lunn Private Capital** is an affiliate of Connor, Clark & Lunn Financial Group, providing professional discretionary money management services to high net worth individuals, foundations, endowments and First Nations across Canada. We are currently looking for an **Asset Mix Associate** for our Vancouver office.

### What You'll Be Doing

You will be part of the CC&L Private Capital Asset Allocation Team. Led by the firm's Managing Director, Investments, the Asset Allocation team is responsible for providing all aspects of the investment process – strategic and tactical asset allocation, product management and development, and investment planning. The Asset Mix Associate will be an integral member of the Portfolio Management & Trading team and will be responsible for reviewing daily pooled fund trading, perform data integrity functions, review Statement of Investment Policies (SIPs), and monitor new and existing investment constraint violations. The Associate will also support the Associate Portfolio Manager in daily responsibilities. This position will report to the firm's Vice President, Portfolio Manager.

Key responsibilities include:

- Work closely with the Portfolio Management & Trading team to coordinate daily pooled fund trading
- Perform data integrity checks
- Review, document, and implement all Statement of Investment Policy (SIP) received by the firm
- Confirm proper interpretation of investment constraints and monitor new and existing violations
- Complete Asset Forecasting Analysis (AFA) reports
- Support Associate Portfolio Manager during asset mix shifts and Alternatives capital call trading
- Working with the team to provide ideas to improve the pooled fund trading and investment implementation processes

- Ad hoc projects as opportunities arise

### **Candidate Profile**

- One to three years of financial services experience
- Demonstrated ability to prioritize, handle multitasking, and work well under time constraints
- Exceptional attention to detail and accuracy
- Strong analytical, problem solving, and organizational skills
- Strong interpersonal skills and proven ability to work collaboratively in a team environment
- Undergraduate degree
- Progress toward completion of the CFA is an asset
- Exceptional MS Excel skills

### **About Us**

Connor, Clark & Lunn Financial Group manages over \$80 billion on behalf of institutional and individual clients. We believe that success in asset management is an outcome of attracting, retaining and motivating the most talented individuals in our industry. This is best achieved by the delivery of:

**A High-Quality Environment** - To work with people who we hold in high regard; to enjoy the time that we spend at work; to focus on productive activities without the distraction of politics and bureaucracy; to treat each other with respect.

**An Opportunity to Succeed** - To do work that has value and which presents the opportunity for professional growth and development.

**Recognition and Reward** - To recognize each person's contribution and to align compensation with contribution.

Our business comprises eleven institutional investment affiliates that are responsible for investment decision making and client service, Connor Clark & Lunn Private Capital which provides multi-asset class investment solutions and Connor, Clark & Lunn Funds which provides single-strategy investments to individual investors. We have grown from \$29 billion in assets and 200 people in 2008 to over \$80 billion and 600+ people today. As we look forward we can see both challenges and opportunities for further growth that only reinforce our commitment to attracting, retaining and motivating the most talented people in our industry.

To apply for this position, please submit your cover letter and resume combined as one PDF document.

We thank all candidates for their interest but only those applicants selected for an interview will be contacted. **No telephone calls or recruitment agencies will be accepted.**