

## Team Lead - Portfolio Management & Trading

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 unique “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 across Canada, New York and London, UK and through its affiliated investment managers is responsible for the investment of approximately \$90 billion in financial assets.

**Connor, Clark & Lunn Private Capital** is an affiliate of the Connor, Clark & Lunn Financial Group, providing professional discretionary money management services to individual investors, foundations and endowments. The firm is currently responsible for approximately \$12 billion in client assets. We are currently looking for a **Team Lead - Portfolio Management & Trading** for our Vancouver office.

### What You Will Do

- Report to the firm’s Chief Investment Officer
- Lead a team (currently 4) of PM’s, Associate PM’s & Trade Support
- Be a registered Portfolio Manager
- Oversee the development of asset allocations for customized client portfolios & model portfolios
- Manage asset allocations to reflect the Asset Mix teams views, guidelines and objectives within the client IPS
- Monitor and implement a series of model portfolios reflecting the Asset Mix teams market views
- Oversee the implementation of asset allocation changes for all clients
- Work with the client facing team to support customized client IPS creation
- Work with the client facing team to develop custom asset allocation and security selection
- Work with the asset class specific investment teams to implement & oversee segregate portfolios
- Assist in securities trading, portfolio monitoring and rebalancing
- Create cash flow projections and oversee capital calls for Alternative investments
- Operational involvement as required to support investment duties
- Work independently with minimal guidance

## What You Bring

- **Industry Knowledge:** You possess at least 3-5 years of work experience, with the last 3 years in an investment research or portfolio management role.
- **Investment Experience:** Demonstrated investment experience in asset allocation, portfolio management and implementation
- **Interpersonal Skills:** Demonstrated ability to work well in a smaller team environment. You possess strong interpersonal skills and are a great team player.
- **Communication skills:** You are a good communicator, able to listen and understand requirements, translate those into a series of desired portfolio characteristics and communicate rationale for portfolio selection. You seek understanding and take ownership for outcomes.
- **Entrepreneurial Mindset:** You possess an entrepreneurial mindset with a strong interest in making a long-term career commitment to the firm. You have a strong work ethic and demonstrated attention to detail.
- **Curious:** You are a curious and independent thinker that is comfortable with an unstructured, unsupervised work environment.
- **Education:** You possess an undergraduate degree and the CFA designation.

## About Connor, Clark & Lunn Financial Group

Connor, Clark & Lunn Financial Group Ltd. (“CC&LFG”) provides a broad range of traditional and alternative investment products and services to individuals, advisors and institutional investors. Our business comprises of eleven institutional investment affiliates that are responsible for investment decision making and client service, as well as distribution affiliates including Connor Clark & Lunn Private Capital, which provides multi-asset class investment solutions and Connor, Clark & Lunn Funds which distributes single-strategy investments to individual investors. CC&LFG partners with each of its affiliates by contributing world class operations, product development expertise, broad distribution, and business management. We have grown from \$29 billion in assets and 200 people in 2008 to approximately \$90 billion in assets and over 640 people today. This has been accompanied by a high level of change in technology, types of assets managed, trading activity and geographic growth. As we look forward, we can see both opportunities and challenges for further growth that only reinforce our commitment to attracting, retaining and motivating the most talented people.

This is best achieved by:

- **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.

*CC&L is committed to creating a diverse and inclusive environment and is proud to be an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to gender, ethnicity, religion, sexual orientation or expression, disability, or age.*

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

We thank all applicants in advance for their interest, but only those candidates shortlisted for interviews will be contacted. **No telephone calls or recruitment agencies will be accepted.**