Private Client Services Associate

Connor, Clark & Lunn Private Capital Ltd.
Edmonton, AB

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 across Canada and London, UK and through its affiliated investment managers is responsible for the investment of over $80 billion in financial assets.

Connor, Clark & Lunn Private Capital is an affiliate of Connor, Clark & Lunn Financial Group, providing professional discretionary money management services to individual investors, aboriginal groups, foundations and endowments.

Role Purpose

Are you a professional who thrives in an innovative environment and is looking to make contributions to a dynamic, fast-growing company? We are currently recruiting for the position of Private Client Services Associate in our Edmonton office.

As an Associate at Connor, Clark & Lunn Private Capital you are the front line of client service that directly impacts the client experience and is vital to the success of our organization. In this role, you are a member of a collaborative and client-focused team requiring exceptional communication and problem-solving skills. Through a combination of client-relationship and time-management abilities, market and product knowledge, you support assigned Investment Professional(s) in handling client relationships to deliver exemplary client service. You demonstrate good judgment and have a high level of integrity and discretion.

Job Description

- Build and galvanize relationships through professional communication with clients
- Work with internal operational teams to resolve issues that may arise and respond to client inquiries
- Understand the platform of investment products and services, enabling you to service clients

- Customize presentation materials for new and existing clients
- Lead the onboarding process and establish a foundation for a positive client experience
- Execute all transactional requests and coordinate cash settlement as needed
- Contribute to improving and streamlining the service model and operational procedures
- Participate in ad hoc projects and special assignments as needed

Requirements

- Excellent written and verbal communication skills
- Exceptional attention to detail
- Experienced at working independently, as well as in partnership with other team members
- Strong organizational and time-management skills with a proven ability to multi-task and work autonomously in a fast-paced environment
- Good judgment coupled with the ability to set clear expectations and make sound decisions
- University degree and/or a minimum of two years of related experience
- Advanced user of Excel, PowerPoint, Word and Adobe Acrobat
- Understanding of private client service and investment management practice is an asset

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

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.