

## Private Client Services Associate

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



We are looking for the next **Private Client Services Associate** to join our Calgary office. In this role, you will be 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 Professionals in handling client relationships to deliver exemplary client service.

### What You Will Do

- 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 settlements as needed
- Contribute to improving and streamlining the service model and operational procedures
- Participate in ad hoc projects and special assignments as needed

### What You Bring

- 1 to 2 years of related or transferable work experience
- Undergraduate degree, preferably in a related field and/or relevant work experience in a similar role
- Excellent written and verbal communication skills
- Exceptional attention to detail
- Experienced 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
- Good judgment coupled with the ability to set clear expectations and make sound decisions
- Advanced user of Excel, PowerPoint, Word and Adobe Acrobat
- Understanding of private client service and investment management practice is an asset

### Who We Are

Connor, Clark & Lunn Financial Group Ltd. 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 mutual funds. 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 over \$86 billion in assets and over 600 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 in our industry.

We bring significant scale and expertise to the delivery of non-investment management functions through the centralization of all operational and distribution functions, allowing our talented investment managers to focus on what they do best. 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.

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.