



Investment Associate – Vancouver

FIRM OVERVIEW

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant culture that we have built and sustained for many years. These values are the cornerstone of our culture and the principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers and every other variety of person you can imagine. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. A recipient of a Canada's Volunteer Award from the Government of Canada, we are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

We currently have an opportunity for an Investment Associate to join our award-winning firm in our Vancouver office.

In this role, you will work directly with a results-oriented team of investment professionals who are focused on providing exceptional client experience with value-added services. This position offers competitive compensation, a collaborative work environment and an opportunity to grow and develop in the industry.

RESPONSIBILITIES

- Focus on exceptional client experience including onboarding, execution of trades, report preparation and ongoing communication
- Assess clients' needs and objectives, then assist in structuring portfolios appropriate for clients
- Contribute to the growth and development of the business, including team project work
- Various aspects of general administration – including client correspondence and telephone communication
- Participate in client planning process, including client data collection and liaising with Odlum Brown Financial Services Limited* to prepare financial projections



KNOWLEDGE AND EXPERIENCE

- Registered in good standing as a Registered Representative with IIROC
- Additional industry-recognized designations, certification or charter (e.g., CFP or CIM®)
- Three to five years of relevant investment industry experience
- High level of professionalism and strong communication skills
- Ability to readily discuss firm recommendations
- Experience with more complex situations including division of family assets, trusts and estates
- Solid working knowledge of MS Suite of programs including Word, Outlook, Excel
- Knowledge of Salesforce and Broadridge's Dataphile would be an asset

COMPETENCIES AND PERSONAL ATTRIBUTES

- Client service focused – committed to exceeding client expectations
- Proven ability to establish trust and build long-term relationships with clients
- Competent at supporting clients with retirement and estate planning* goals
- Genuine willingness to invest the time required to understand clients' needs and expectations
- Committed to continually developing the knowledge and expertise required to contribute optimal value for clients
- Demonstrates personal drive – self-directed, motivated and approaches the role with energy and the determination to succeed
- Effective at multitasking, with the ability to focus on both day-to-day events as well as the longer-term picture
- Regularly contributes high-quality thinking to the development of ideas to expand the business
- Self-motivated with a clear vision of what is required to be part of a high-performance team

At 100 years young, our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this role, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **March 31, 2023**.

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.

* Odlum Brown Financial Services Limited is a wholly owned subsidiary of Odlum Brown Limited offering life insurance products, retirement, estate and financial planning exclusively to Odlum Brown clients.