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.

RESPONSIBILITIES

- Financial modeling and data analysis of client portfolios for the purpose of portfolio optimization, tax optimization and suitability
- Provide overall business analytics
- Research and propose solutions for tax and regulatory-related issues and opportunities
- Trade execution and management
- Portfolio projections and liquidity management
- Various aspects of general administration
- Coordinating client account documentation and follow through to account opening
- Assisting with client outreach including email, client correspondence and telephone communication

- Preparing daily, weekly and monthly reporting

QUALIFICATIONS AND EDUCATIONAL REQUIREMENTS
- Intermediate to advanced knowledge of MS Word, Excel and Outlook
- Previous financial services and data analysis experience would be an asset
- Proficiency with Salesforce
- Registered in good standing as a Registered Representative with IIROC
- CFA Charterholder candidate

KNOWLEDGE AND EXPERIENCE
- Strong communication skills
- A team player with a clear vision of what is required to be part of a high performance team
- Strong analytical and organizational skills, with the ability to manage multiple priorities
- Detail oriented
- Disciplined, driven and operates with a high level of accountability

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 job, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **May 29, 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.