



Investment Associate – Vancouver

WHO WE ARE

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for over 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, ever-evolving culture that we have built over the 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 – all with diverse backgrounds and experiences to share from around the globe. 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 have an opportunity for an Investment Associate to join our award-winning firm and a highly successful, six-person team in our Vancouver office.

WHAT YOU'LL DO

The team comprises three experienced Portfolio Managers, an Investment Associate and two Investment Assistants. They focus on conservative, long-term investing under a discretionary managed-account format, with approximately \$1 billion in assets under management.

You will provide comprehensive support to the Portfolio Managers. You have a strong client service orientation, are proactive and engaged, take pride in your work and have a proven history of building relationships with clients. The ideal candidate is looking for a long-term fit in a client-facing Investment Associate role.

RESPONSIBILITIES

- Provide proactive advice and support to our clients and the Portfolio Managers throughout the wealth management process
- Help deepen existing relationships and welcome new clients to the firm



- Identify new opportunities and help grow the business by supporting the advisory team with new client acquisition
- Execute mutual fund, equity and fixed income trades
- Support with portfolio rebalancing, being mindful of client objectives, risk tolerance and tax consequences
- Organize client meetings and reviews by determining agenda and key topics, prepare documentation, execute post-meeting work and attend client meetings when required
- Respond to client account inquiries and take ownership of follow-ups
- Provide daily, weekly and monthly reporting
- Coordinate activities with internal wealth management specialists, manage documentation, track progress and follow-up
- Provide administrative support when necessary

KNOWLEDGE AND EXPERIENCE

- Minimum of 5 years of experience within the investment industry
- Registered with CIBC as a Registered Representative in good standing
- Intermediate to advanced knowledge of Microsoft 365
- Knowledge of Broadridge's Dataphile and/or Salesforce is an asset
- Strong verbal and written communication and presentation skills
- A team player with a clear vision of what is required to be part of a high-performing team
- Strong analytical and organizational skills, with the ability to manage multiple priorities
- Detail oriented, delivering high quality work
- Disciplined, driven and operates with a high level of accountability

WHAT WE OFFER

A culture of openness, collaboration and respect is foundational to our firm. We are a diverse, driven group of individuals who genuinely care about one another and encourage and appreciate each other's contributions. We believe in rewarding team members and do this by providing a competitive total rewards package that is fair and equitable; mentorship programs; flexible work options; and a variety of professional development opportunities to expand your career. This role has an expected salary and commission range of \$90,000 - \$120,000/year, plus the potential for bonuses.

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 **January 13, 2025**.

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.