



**AVP, PRIVATE WEALTH MANAGEMENT
TORONTO, ON
Job Posting # 17-098
May 23, 2017**

Cougar Global Investments is an affiliate of Eagle Asset Management and is a subsidiary of Raymond James Financial, Inc.

We are currently seeking a permanent, full-time Assistant Vice President, Private Wealth Management for with Cougar Global Investments Ltd. (CGI). The ideal individual will design a business plan and strategy to attract wealth management business to Cougar's asset management products & services. This role will utilize specialized knowledge and skills obtained through experience to serve as a resource to clients regarding overall financial planning issues which may include portfolio design, retirement planning, risk management, estate planning, and education funding. This position will also be involved in product development activities in response to market data and demands which are perceived as they work with potential clients. Within Cougar, the AVP, Private Wealth Management must develop effective working relationships with support staff and Senior Investment staff as a team member of the organization.

Specifically you will:

- Work closely with senior management and the Investment group, with vital leadership responsibilities for the wealth management channel new business development;
- Proactively develop relationships with new key market prospects;
- Research and evaluate competitor strategies, strengths and weaknesses and respond to take advantage of opportunities;
- Develop and maintain a strong understanding of Cougar's investment products and develop solution-based marketing focus that addresses customer needs;
- Monitor the customer's portfolio and make recommendations consistent with changes in economic and financial conditions as well as the customer's needs and objectives, taking newly offered investments into consideration;
- Utilize the findings of advanced economics to develop macro-economic scenarios and simulate the behavior of investors in specific asset classes under a range of specific scenarios;
- Obtain and verify the customer's purchase and sale instructions, enter orders, and follow up on completion of transactions;
- Other duties as assigned.

To qualify for this opportunity you possess

- A minimum of 7 years of experience in a revenue generating role within the securities industry;
- An undergraduate degree in Business or related;
- Completed of a MBA is an asset;
- Sound knowledge in Economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data;
- Current knowledge of investment products, industry rules and regulations, and financial planning;
- Qualifications to allow for registration with the Ontario Securities Commission as an Advising Representative or Associate Advising Rep as per NI 31 103;
- Successful completion of the CIM or CFA is an asset;
- Self-motivated and the ability to work under pressure.



This is a full-time position with a competitive compensation and benefits package.

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 17-096 by June 30, 2017** to:

Cougar Global Investments
357 Bay Street
Toronto ON M5H 2T7
Email: EagleEmployment@EagleAsset.com

To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company, including but not limited to a credit and criminal record check. Employment is contingent on the satisfactory completion of a pre-employment background check.

We sincerely thank all applicants who express an interest in this role: only those being directly considered will be contacted.

Raymond James Ltd. recognizes the value of a diverse workforce and appreciates the unique skills and special contribution of each employee. We are committed to accessibility for candidates through all stages of the recruitment process. Should you require accommodation, please contact Human Resources via email at EagleEmployment@EagleAsset.com.