



## **Encasa – Senior Investment Advisor (Toronto, ON, Permanent, Full-time)**

Encasa Financial Inc. is a registered Investment Fund Manager that manages the investment of pooled capital reserves of non-profit and co-operative housing providers and other value-aligned organizations. Encasa Financial operates the Social Housing Investment Funds (SHIF), consisting of three mutual funds targeted to the investment needs of non-profit and co-operative housing providers, and other not-for-profit organizations. We are a small, high-performing team in a fast-paced, collaborative and mutually respectful office environment.

We have an exciting opportunity for a Senior Investment Advisor! This is a new role for Encasa resulting from a change in the delivery model of our products and services. We are looking for someone with a keen interest in responsible investment products and shares our values of building and strengthening the non-profit and co-operative sector. The ideal candidate will be someone who is motivated by the challenge of building our business with us and providing direct and indirect value to our investors.

This role is located in Toronto, Ontario, working from our head office.

### **Responsibilities**

As the Senior Investment Advisor, you will be a key member of our team and be integral in the delivery of superior, personalized advice-based service to current and prospective clients who are primarily non-profit and co-operative housing provider corporations.

You will need to:

- Provide investment allocation advice and services to our clients by understanding their investment and cash flow needs and offering our Social Housing Investment Funds (SHIF)
- Work with the Encasa team to look for market expansion opportunities in Ontario as well as other provinces with a non-profit and affordable housing sector perspective in mind
- Work with clients to develop an appropriate, value focused investment portfolio using Encasa's three SHIF mutual funds
- Provide updates to over 800 existing clients, as well as new clients on their investment performance and work with them to rebalance their account as appropriate
- Be responsible for the customer support systems, and assist in the further development, and implementation the highest standards of customer care and support
- Ensure all client interaction and administration is compliant with Canadian securities regulations and the policies of Encasa Financial
- Be involved in initiating, organizing and participating in investment forums, trade shows, seminars and webinars for client groups
- Help to develop and execute marketing and communication strategies including creating investment focused articles, newsletters and social media posts.
- Coach, mentor and supervise junior team members as required in Vancouver and Toronto



### **Qualifications**

What we're looking for in a candidate:

- Holds a CFA and/or CFP designation
- Minimum 5 years of experience in investment or financial planning
- Minimum 3 years of experience in coaching and/or supervising a team
- MFDA license or similar qualifications
- A strategic self-starter who is a creative problem solver and is comfortable working with minimum level of supervision
- Excellent communication and customer service skills
- Successful at marketing investment programs and growing the investor base
- Motivated in delivering value to the non-profit and co-operative sector
- Actively interested in responsible investment
- Has the flexibility to work off-hours and be willing to travel in and out of the province

Bonus points awarded for:

- CIM designation
- Bilingual in French and English

### **What We Offer:**

- A meaningful career helping to support the social housing sector
- Competitive salary that aligns with experience and qualifications
- A key role in shaping strategies and a definitive impact on the business
- The opportunity to work with a great team at Encasa!

### **To Apply:**

Please send your cover letter and resume to [resumes@encasa.ca](mailto:resumes@encasa.ca) on or before October 23, 2017.

Encasa would like to thank all candidates for their interest in the position. However, only candidates selected for an interview will be contacted.

Encasa is committed to equity in employment and encourages applications from all qualified applicants. If you are a candidate with a disability and require accommodation during the hiring process, please contact us.