

MIRABAUD Canada Inc. is member of an internationally active group providing financial services geared to clients who seek personalized relationships, high-quality services and maximum performance. The group has its roots in one of Switzerland's oldest banking establishments, MIRABAUD & Cie SA, founded in 1819. Specialists in portfolio management for private clients, we hold more than 3.2 billion dollars in assets under management. Established in Québec since 1985, MIRABAUD Canada Inc. offers its customers personalized strategies for wealth management. MIRABAUD Canada Inc. offers its clients international securities dealings with global custody. Our approach is to achieve optimal, absolute performance while minimizing risk and ensuring adequate diversification. Member of IIROC and the Canadian Investor Protection Fund.

www.mirabaud.ca

JOB DESCRIPTION

POSITION : **Investment Representative (Under Review)**

REPORTING OFFICER : **CIO**

RESPONSIBILITIES AND DUTIES

- Administrative support for the private client portfolio management team.
- Acting as the first point of contact for clients for day to day administrative requests.
- Preparation of portfolio reports for private clients (including foreign offices) and smaller institutional accounts.
- Client Support and client administration including client internet access; enquiries and direct client instructions.
- Preparation and distribution of bi-weekly and monthly hedge fund reports for clients.
- Client account openings, updates, compliance reviews and closings.
- Compliance support for clients under administration.
- Verification of daily account operations to ensure the completeness of transactions.
- Processing bill payment and cheque requests.
- Ensuring a proper flow of information and requests between the front office and the other departments.
- Help in preparing investment proposals for prospective clients, including model portfolios.
- Entry and follow-up of client orders for equities, fixed income, options, mutual funds, hedge funds and FX.
- Setting up, trading and follow-up on private equity and LP funds with corresponding counterparties.
- Monitoring cash position and 48hr call deposits to ensure proper trade settlement.



COMPETENCIES

- Experience in dealing with private clients and providing support to portfolio manager or stock broker – “Proactive” support.
- Strong verbal and written communication skills with good presentation, showing entrepreneurial initiative when occasion demands.
- Canadian Securities Course, CPH, IR Training.
- University Degree with minimum 2 years experience.

ABILITIES

- Strong computer and mathematical skills.
- Well organized, precise.
- Bilingual (French and English) written and verbal with very good grammar.
- Ability to work as part of a team and to work under pressure.

Send résumé to: Yves Erard at yves.erard@mirabaud.ca

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