K J HARRISON
INVESTORS

TRADING AND ONBOARDING SPECIALIST

K.J. Harrison & Partners Inc., a private investment management firm based in Toronto that offers discretionary investment management to high net worth individuals and families across Canada, is looking for a Trading and Onboarding Specialist to join our team. We currently manage over $1 billion for clients with an average portfolio in excess of $1 million. Our office is located in Toronto in the Bloor & Avenue Road area. This is a dynamic, multi-faceted position whose responsibilities include providing trade support to the Private Client Team and Investment Team, onboarding new clients and opening new client accounts.

Salary will be commensurate with education and experience.

Qualified applicants should submit a resume and cover letter, in confidence, by e-mail to cfulsang@kjharrison.com by December 31, 2017.

We thank all candidates for their interest in the position; however, only individuals whose education and experience most closely match the requirements of the role will be contacted.

Key Responsibilities:

- Execute trades for Portfolio Managers in the Private Client Team
- Provide trade support for Portfolio Managers in the Investment Team
- Review and reconcile daily trades
- Work closely with the Portfolio Managers and Private Client Associates in all of aspects of onboarding new clients and opening new client accounts
- Prepare and maintain all client account documentation and files
- Set up client data within the firm's CRM system
- Importantly, as a strong team player, be willing, able and capable of backing up and supporting other Trading & Onboarding Specialist, Private Client Associates and the operational needs of the firm
- Participate in client events

Key Proficiency Requirements:

- Minimum of 3 years experience in the investment industry as a Trading & Onboarding Specialist or a comparable role utilizing similar skill sets
- Registered with the Investment Industry Regulatory Organization of Canada (IIROC) as an Investment Representative (IR) or completion of the Canadian Securities Course
- Personable and dynamic individual with deep experience in dealing with high net worth and high profile clients
- Demonstrates professionalism and high integrity
- Unequivocally, a team player
- Strong communications and interpersonal skills
- Thorough knowledge of the private client business, including client account procedures (including both unregistered and registered investment accounts)
- Superb organizational and time management skills
- Ability to multi-task with conflicting demands
- Demonstrates excellent attention to detail
- Experience using ISM, CRM and portfolio management systems
- Seamless proficiency in Microsoft Office (including Excel, Powerpoint and Word) and Microsoft Outlook
- Ability to work with minimal supervision
- Highly reliable and resourceful
- Ability to be operationally flexible, including working extended hours when required