

Managed Accounts Platform Lead

Business Overview

Fidelity Clearing Canada (FCC) is the leading independent clearing broker and custodian in the Canadian market. We provide trade execution, clearing, custody and back-office support services to Canadian-based brokerage firms and registered Portfolio Managers.

The Managed Accounts Platform Lead will be responsible for the implementation, management, service and sales support for the Managed Accounts Platform. Reporting to the Product Solutions VP, the manager is the key point of contact for the sales team, vendor, internal partners and clients as it relates to the Managed Accounts Platform. They will work with all stakeholders and the project team to successfully launch, grow and maintain the Managed Account Platform business at FCC.

Job Responsibilities

- Sales Support
 - Subject matter expert on the Managed account platform
 - Participate in RFPS, RFIS and other information gathering for new opportunities
 - Content provider for sales collateral and presentations
 - Demonstrate the tool to prospective clients
 - Build and maintain competitive database for Managed Platforms
 - Contract management
- Service Support
 - Participates in the construction and delivery of training materials for the platform
 - Provide training for all clients on the managed accounts platform
 - Handles all internal and external service & support inquiries related to the platform
 - Manage client relationships
 - Handles all client implementations onto the platform, working with the vendor, technology, client and any other departments as needed
 - Facilitates all maintenance, upgrades and platform enhancements with vendor, FCC and external Clients
- Manages support relationship with vendor
 - Responsible for handling production problems with vendor
 - Release management
 - Facilitate client implementations on the platform. Liaise with FCC technology and vendor for successful and efficient client implementations.
 - Coordinate impact of changes on various applications that feed into the platform.
 - Ensure tool is in line with regulatory compliance requirements.

Fidelity is proud to offer a telecommuting work schedule. Managed Accounts Platform Lead (Fidelity Clearing Canada) will have an alternating schedule of working from home and in the office, on a schedule determined by business need. This position is located in Toronto, ON.

What We're Looking For

- Minimum 5 years' experience in the brokerage/securities industry in product roles with at least 2 years working with a managed accounts platform/program.
- Completion of a Bachelor's Degree
- Certifications such as a CFA ,CSC ,MBA will be an asset
- Strong Customer Experience – understanding customer needs and addressing these needs in the solution design
- Analytical Thinking
- Seeks discrepancies and inconsistencies in available information, explains variances; recommending a course of action for resolution.

- Knowledge of portfolio management tools and techniques; gathering and analyzing the competitive environment.
- Strong written and verbal communication and presentation skills
- Comprehensive knowledge of investment management products and strategies
- Experience with technology solutions for retail advisors and brokers

Interested applicants are required to apply on-line at:

<https://fidelity.taleo.net/careersection/10142/jobdetail.ftl?job=1705688>

No inquiries or agencies please. We thank all applicants for their interest. Please note that only short-listed candidates will be contacted.