



JOB TITLE: Retail Equity Trader

LOCATION: Toronto, ON

REPORTING TO: Head of Wealth Management, Flow Desk

COMPANY OVERVIEW:

We're a leading independent, Canadian-owned and operated wealth management and capital markets firm, known for our client-centered approach and entrepreneurial spirit. Echelon is a compelling option for investors seeking unbiased investment solutions, professional management, and unparalleled service. We aim to build lifetime relationships and deliver superior service. Our financial professionals have the freedom to offer truly independent investment advice, always putting their clients' needs first. We are also a growing firm, with over \$8 billion in assets under administration and management. We service clients across Canada from our offices in Toronto, Oakville, Ottawa, London, Montreal, Vancouver, Calgary, Victoria, Saskatoon, and Edmonton.

POSITION OVERVIEW:

As Retail Equity Trader, you are responsible for representing the retail advisor network. You will manage and execute trades on the electronic system for retail advisors, book and post trades to client accounts and manage the retail trade inventories. You will be using multiple trading platforms and a variety of trading algorithms. You will also facilitate the equities trading for the SMA program. Success in this role will require you to be somebody who possesses strong business acumen, enjoys working in fast-paced environments, and thrive in collaborative environments. You also have strong analytical skills and sound judgment. Given the nature of dynamic markets, you possess well-developed decision-making skills, multi-tasking skills, and have demonstrated experience working in time-sensitive conditions.

Core Responsibilities:

- Cover our retail network
- Execute trades on behalf of the brokers and portfolio managers
- Manage equity and option products and inventories
- Work in a team environment and interact closely with equity sales, research analysts, investment banking professionals, and back-office staff
- Act ethically at all times by ensuring all transactions and procedures are in accordance with governing rules and regulations, and in accordance with company policies
- Utilize analytical problem-solving skills to troubleshoot trading systems, develop new trading tactics, and improve platform operations
- Any other administrative duties as required

Key Attributes:

- Diligent, conscientious, and detail-oriented trading professional
- Highly organized and results-focused with a strong track record of managing multiple activities
- Anticipatory, proactive and responsive – thinks ahead and plans accordingly with minimal guidance
- Outstanding communication, interpersonal, and relationship management skills – operates with tact, diplomacy, and integrity at all times
- Maintains a calm and confident demeanor under pressure
- Strong work ethic and team player – trustworthy, capable and reliable

Echelon is committed to fostering an inclusive, accessible environment where all employees and customers feel valued, respected and supported. If you are invited to interview and require accommodation (including alternate formats of materials, or accessible meeting rooms or other accommodation), please let us know and we will work with you to meet your needs

Application instructions:

To apply, please click “Apply for this job”. We thank all applicants for their response but only those considered for an interview will be contacted.