



JOB TITLE: Institutional Sales

LOCATION: Montreal, QC

INDUSTRY: Financial Services

REPORTING TO: Head of Institutional Sales & Trading

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.

Echelon Wealth Partners is proud to be recognized as a Great Place to Work® (2017-2022) and further securing our place on the list of Best Workplaces® for Financial Services (2019-2021), Best Workplaces® for Inclusion (2020), Mental Wellness (2021), & named Best Workplaces™ in Canada (2022). We've also been recognized as one of the fastest-growing companies by Maclean's/Canadian Business magazines (2019-2020) and the Globe & Mail (2020).

POSITION OVERVIEW

Reporting directly to the Head of Institutional Sales and Trading, we are seeking a polished, dynamic and results-focused sales professional to join our Institutional Sales and Trading team in Montreal. The ideal candidate will support and promote complete coverage of buy-side clients, with dynamic ideas and efficient trade execution. The ideal candidate will be a thought-leader, a builder and continue to perpetuate a cerebral, trust-oriented culture while delivering exceptional client service and measurable sales results.

CORE RESPONSIBILITIES

- Develop and maintain relationships with, and service to, existing buy-side portfolio managers/accounts
- Interface with our research analysts in order to maximize market share and commissions and provide market feedback to improve the relevance and quality of the research product
- Build and cover client accounts

- Leverage research products and increase visibility of the equity research team through analyst marketing
- Organize client events and corporate roadshows

KEY ATTRIBUTES

- Diligent, conscientious and detail-oriented sales professional
- Highly organized and results-focused with a strong track record of managing multiple accounts, activities and mandates
- 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.

QUALIFICATIONS

- A minimum of two years of experience in Institutional Equity Sales or other relevant financial sales functions
- Existing relationships with portfolio managers and buy-side analysts is a plus
- Bachelor's degree in a relevant field; a master's degree would be considered an asset

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 visit: <https://www.linkedin.com/jobs/view/3047532745>