



## **ABOUT US**

CI Investments is one of Canada's largest investment management companies. It offers a wide range of investment products and services, and is on the Web at [www.ci.com](http://www.ci.com). CI is a subsidiary of CI Financial Corp. (TSX: CIX), an independent, Canadian-owned wealth management firm with \$172.5 billion in fee-earning assets as of October 31, 2018.

**POSITION:** Manager, Product Development, Discretionary Investment Platform

**LOCATION:** Toronto, ON (M5C 3G7)

**STATUS:** Full-time

## **JOB OVERVIEW**

We are seeking an experienced leader to join our Product Development team as a **Manager, Product Development, Discretionary Investment Platform** for Assante Private Client. The successful candidate is tenured, experienced and motivated about bringing to market innovative investment product solutions leveraging technology while providing superior service to Investment Counsellors and clients. A solid understanding of the financial services industry with emphasis on discretionary investment management and fundamentals of financial planning, coupled with a client-first mindset and proven experience leading projects in a fast-paced, multi-disciplinary environment will be critical to delivering successful results.

## **WHAT YOU WILL DO**

- Lead the development of a leading-edge discretionary investment platform for Assante Private Client under the guidance of the VP, Product Development and in collaboration with main business stakeholders (e.g. Wealth, Estate and Tax Planning, Investment Portfolio Management) and the Operations team.
- Partner with Investment Portfolio Management team to create segregated investment mandates, asset allocation strategies and model portfolios.
- Collaborate with Investment Counsellors, Compliance and Operations to ensure the platform is competitive, efficient and ensures an excellent client experience.
- Define and optimize pricing strategy and product innovation to ensure the best product offering, including monitoring and review of product performance.
- Support advice delivery by disseminating investment expertise and insights Sales teams and Investment Counsellors.
- Review products and platform regularly to ensure they remain competitive with current market trends from a pricing, taxation, investment selection and client experience.
- Stay on top of trends in the North American asset management industry to assist in the development and positioning of forward-thinking products.

## **WHAT YOU WILL BRING**

- 7+ years of experience in the Private Client segment at a Canadian Financial Institution.
- Undergraduate degree in business, finance with solid knowledge of financial planning fundamentals.



- CFA and/or CFP or equivalent.
- Strong Time management skills, including the ability to multi-task and work under tight deadlines.
- Strong presentation and facilitation skills, with the ability to articulate difficult concepts.

#### **WHAT YOU CAN EXPECT FROM US**

Our dedication to the Employee Experience at CI is aimed at supporting, empowering and inspiring our talented team through:

- Recognition & Compensation
- Training & Development
- Health & Well-being
- Communication & Feedback

If you are a passionate, committed and dynamic individual, please submit your resume in confidence through our careers page by clicking the following link:

[https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=8af61d30-ce97-4d97-af7d-bda5fa023504&jobId=286643&lang=en\\_CA&source=CC2&cclId=19000101\\_000001](https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=8af61d30-ce97-4d97-af7d-bda5fa023504&jobId=286643&lang=en_CA&source=CC2&cclId=19000101_000001)

Only qualified candidates selected for an interview will be contacted.

CI Financial Corp. and all of our affiliates (“CI”) are committed to fair and accessible employment practices and we are committed to providing accommodations for persons with disabilities. If you require accommodations in order to apply for any job opportunities, or require this posting in an additional format, please contact us at [accessible.recruitment@ci.com](mailto:accessible.recruitment@ci.com), or call 416-681-4747. **If you are contacted by CI** regarding a job opportunity or testing and require accommodation in any stage of the recruitment process, please use the above contact information. We will work with all applicants to determine appropriate accommodation for individual accessibility needs.