



CUMBERLAND

Private Wealth

SENIOR RESEARCH ANALYST, U.S. EQUITIES

CUMBERLAND PRIVATE WEALTH MANAGEMENT INC.

TORONTO, ONTARIO, CANADA

Career Opportunity

Cumberland continues to expand and as one of Canada's top independent, partner-owned investment management firms, we are looking to provide an opportunity for an experienced, Senior Research Analyst, US Equities to join our investment team.

Our brand is linked to our history, which has been centered around our pure focus on wealth management, investment excellence and the client experience that have been garnered over several decades.

Our investment team is a passionate, motivated, and committed group of professionals, who have their interests and skills aligned with those of our clients and take pride in their quality of work and knowledge they possess in the wealth management field. The incumbent of this position will possess a macro-economic perspective with a working knowledge of the US equity market, its sectors and experience in writing research and coverage reports on US equities for use in the company managed investment strategies. The incumbent will collaborate on strategy with the portfolio managers on the investment team and other research analysts. The successful candidate will enhance Cumberland's investment reputation by delivering quality research reports and superior investment returns over the long term while adhering to the company's strong investment culture.

The ideal candidate will:

- Act as the primary research analyst for the U.S. market and specific Equity securities
- Support the firm's investment performance and reputation by ensuring consistent application of an investment discipline, developing sector views, and generating actionable 'concept' thematic ideas, supported by specific company recommendations
- Provide input to clients and various internal forums on investment topics and perspectives – fully supporting and contributing to client and investment team meetings where required
- Work with investment leadership team, to further strengthen the team's investment culture:
 - Contributing to a collegial, supportive, and inquisitive environment
 - Proactively contribute to investment thinking within the department and ensure the best ideas are shared and represented

Qualifications:

- Strong academic credentials. Bachelor's degree; plus at least one of CFA, MBA or CPA
- More than 5 years of experience in research analysis with a focus in U.S. Equities

- Background with a Mutual Fund Company, an Institutional or Private Investment Management Firm, Insurance Company, Brokerage Research firm or a Pension Fund is preferred
- Ability to demonstrate success with prior US stock recommendations purchased or sold
- Experienced writer with some presentation experience to smaller groups is preferred

Personal Traits:

- Collegial with a 'pitch-in', partnership mentality but also not afraid to take a stance and make a decision to act
- Opinionated with a view
- Focused and hard-working
- Entrepreneurial and thrives in a smaller, private company environment
- Unquestionable integrity
- Thematic thinker; able to think out of the box

Interested professionals should forward their resume and cover letter to careers@cpwm.ca, and kindly reference Senior Research Analyst, US Equities opportunity.

We thank all individuals for their interest in our firm. Only those selected for an interview will be contacted.

COVID-19 CONSIDERATIONS:

Our office space allows for generous distancing. To keep our team and clients safe, we follow all Covid-19 precautions. Our business is classified as an essential service and teams work in the office.