THE RAE LIPSKIE PARTNERSHIP™

PRIVATE WEALTH MANAGEMENT

www.raelipskie.com

Rae & Lipskie Investment Counsel Inc. is one of the largest, privately held (non-bank owned) investment counsel firms in southwestern Ontario. With client assets under management of $1 billion, our recent and ongoing growth requires an accomplished Portfolio Manager to join our team of 12 investment professionals. Our firm is a private wealth manager providing “fee-only” discretionary portfolio management for high net worth individuals and their families, corporations, foundations and charitable organizations.

Investment Counsellor/Portfolio Manager

Waterloo Ontario

If you are looking to join a team dedicated to providing exceptional personal service to clients, and you have experience in high net worth client relationship & portfolio management this is an excellent opportunity for you. This is a salaried plus bonus position. Preference will be given to those candidates with established client relationships along with a proven record of investment research and an ability to market for new clients.

Position Summary:

Manage existing client portfolios on a discretionary basis within firm guidelines, ensure ongoing implementation of client policies and objectives, develop new clients independently and as part of team presentations, and be an integral part of the investment research and decision making committee.

Education and skills:

- Minimum of 8 years of experience in managing discretionary investment portfolios for high net worth clients.
- Must have excellent client care, business development and financial analysis skills.
- University degree in Business, Accounting, Finance or Economics.
- Possession of the CFA or CIM designation; CFP designation would be a plus.
- The successful candidate must be registered in good standing as a Registered Advising Representative by the Ontario Securities Commission.
- Must be a high energy individual with a drive for success and results oriented as well as have a deep desire to service their clients with the utmost ethics.

Apply to brian@raelipskie.com with "Resume-*your name”* in the subject line.

Rae & Lipskie Investment Counsel Inc.
Attention: Brian E. Lipskie, CFA - President
20 Erb St. West, Suite 201, Waterloo, ON N2L 1T2
Phone 519-578-6849 Fax 519-578-7269

In advance, we thank all applicants for their interest, however, only those selected for an interview will be contacted.