Rae & Lipskie Investment Counsel Inc. is one of the largest, non-bank owned investment counselling firms in southwestern Ontario. With client assets under management in excess of $1 billion, our recent and ongoing growth necessitates us to add to our team of investment professionals. Our firm is a private wealth manager providing fee-only discretionary portfolio management services to high-net worth families, corporations, foundations, and charitable organizations. We take pride in providing a friendly, collegial work environment in a community that recognizes the benefit of work/life balance.

Portfolio Manager/Associate Portfolio Manager Waterloo Ontario

If you are looking to join a team dedicated to providing exceptional service to clients, and you have experience in high-net worth client relationship and portfolio management this could be an excellent opportunity for you. This position offers a competitive compensation package which includes salary and bonus. Preference will be given to those candidates with established client relationships along with a proven record of investment research, financial planning, and an aptitude for marketing to prospective clients.

Position Summary:

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

Education and skills:

- 3-10 years experience in managing discretionary investment portfolios for high-net-worth clients.
- 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 an Advising/Associate Advising Representative by the Ontario Securities Commission (or other provincial regulator).
- Must be a high energy individual with a drive for success and results, while possessing a desire to service clients with the utmost in ethics & integrity.

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

Rae & Lipskie Investment Counsel Inc.
Attention: Sheila Yendt, Deputy Chief Operating Officer
20 Erb St. West, Suite 201, Waterloo, ON N2L 1T2
Phone 519-578-6849 | Fax 519-578-7269

We provide a COVID-19 safe/aware office space, and to keep our staff and clients safe we follow covid-19 precautions

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