JOB TITLE: Client Portfolio Manager
COMPANY: The RaeLipskie Partnership www.raelipskie.com
REPORTING TO: President & Chief Operating Officer, Brian Lipskie
LOCATION: In-Office Waterloo, Ontario

Rae & Lipskie Investment Counsel Inc. (operating as The RaeLipskie Partnership) is a dynamic and rapidly growing wealth management firm with client assets under management in excess of $1 billion. Our focus is to provide fee-only discretionary portfolio management helping our clients achieve their long-term wealth, succession, retirement, and charitable giving objectives. We work closely with our clients, along with their taxation, estate planning, and insurance advisors, delivering a holistic solution and client experience. Our people have a passion for the work they do as well as a desire, and the skills, for exceptional client care. We focus on Trust. Experience. Integrity.

CLIENT PORTFOLIO MANAGER:

The RaeLipskie Partnership has an exciting opportunity for a trusted, experienced, and motivated portfolio manager/advising representative who enjoys working in a progressive, team-based, financial services environment. Preference will be given to candidates with established client relationships along with a proven record of investment research and an ability to market for new clients.

POSITION SUMMARY/ESSENTIAL FUNCTIONS:

- Manage existing client portfolios on a discretionary basis within firm guidelines and ensure ongoing implementation of client policies and objectives and maintain regular and direct communication, building strong relationships.
- Independently, and as part of our team, develop new client relationships.
- Contribute to the firm's research and decision-making process.
- Support and lead business initiatives and assist in strategic and key client events across the business.

EDUCATION/JOB SPECIFICATIONS:

- Strong client care, business development, and financial analysis skills.
- Chartered Financial Analyst designation.
- Certified Financial Planner designation would be an asset.
- University Degree with a major in Business, Finance or Economics.
- Registered in good standing as a Registered Advising Representative with the Ontario Securities Commission.
- 5 + years' experience managing discretionary investment portfolios for high-net-worth clients.
- 5 + years performing research involving the financial analysis of investments.
- Excellent understanding of financial markets and the ability to communicate the same with clients of varying levels of financial sophistication.
- Strong written and verbal communication skills, as well as time management and interpersonal skills.
- Understand and support the importance of team culture.
- High energy & positive individual with a drive for success and results, while possessing a desire to service clients with the utmost of ethics and integrity.

WE WILL ONLY CONSIDER APPLICANTS THAT APPLY AS DIRECTED:

Apply with cover letter and resume 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

The RaeLipskie Partnership is committed to accessibility in employment and ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, The RaeLipskie Partnership will endeavor to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview. We thank all applicants for their interest but only those selected for an interview will be contacted.