

RAYMOND JAMES®

PORTFOLIO MANAGER ANALYST

LONDON, ON

Job Posting # 19-052

Raymond James Independent Financial Services is seeking a full-time Portfolio Manager Analyst London IFS branch.

As an independent team of Raymond James Ltd., Tall Oak Private Wealth in London Ontario is part of a leading independent wealth management firm, offering professional investment management and financial advisory services to high net worth individuals, professionals & successful business owners. We provide our clients with strategic financial planning and discretionary portfolio management services.

This position requires an energetic, ambitious and driven investment professional. The successful candidate must have a meticulous attention to detail, possess a positive attitude, and have superior organizational skills.

Specifically you will:

- Closely collaborate with the lead Portfolio Manager to manage client portfolios;
- Administer client portfolios with respect to trading and compliance;
- Assess the investment merits and risks of various investments & strategies;
- Conduct independent equity valuation and analysis;
- Create detailed industry analysis reports;
- Prepare client commentaries and quarterly reports;
- Ad hoc portfolio evaluations for clients and prospects;
- Participate in various promotional presentations and webinars;
- Provide technical and fundamental insight during client and prospective client meetings;
- Firm representative at various events, AGMs, and management meetings;
- Participate in weekly research & investment committee meetings;
- Assist in the development of new business and prospects;
- Prepare financial plans and retirement projections as required; and
- Prepare proposals and client review presentations.

To qualify for this opportunity, you possess:

- Minimum 2 years of experience working in the investment and/or financial services industry;
- CFA Designation or progress desirable;
- Successful completed the Canadian Securities Course;
- Degree in Business with a focus in Finance;
- Proficiency in Microsoft Office suite of products;
- Outgoing, hard-working personality with strong initiative;
- Ability to work with little direction and manage various deadlines;
- Demonstrate effective analytical skills, including financial modeling knowledge and ability;
- Professional communications skills including written, verbal and interpersonal;
- Organized team player;
- Thomson Reuters and/or Morningstar Software experience desirable; and
- Equities trading experience is highly desirable.



The benefits of being a member of the Tall Oak team include:

- Extensive opportunities to grow and develop yourself professionally and personally;
- Opportunity to work as part of the team in an established, reputable company and within a friendly and respectful work environment;
- Competitive compensation package; and
- Participation in our group benefit program.

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 19-052:**

Shawn Jakupi, CFA, CFP
Raymond James Ltd
Suite 1001 – 140 Fullarton Street, London, ON
Phone number: 519-601-9147
Email: shawn.jakupi@raymondjames.ca

To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company, including but not limited to a credit and criminal record check. Employment is contingent on the satisfactory completion of a pre-employment background check.

We sincerely thank all applicants who express an interest in this role: only those being directly considered will be contacted.

Raymond James Ltd. recognizes the value of a diverse workforce and appreciates the unique skills and special contribution of each employee. We are committed to accessibility for candidates through all stages of the recruitment process. Should you require accommodation, please contact us using the above details and we will be happy to help.

