Raymond James is seeking a full-time Portfolio Analyst for one of our independent North York branches. Raymond James Ltd. is one of Canada’s leading independent investment dealers offering high quality investment services to Canadians seeking customized solutions to their wealth management needs.

The Portfolio Analyst is responsible for creating client portfolios, assisting in managing existing portfolios and providing outstanding service to clients. Successful individuals in this role are creative thinkers that perform meticulous analysis and are efficient and effective communicators.

Specifically you will:

- Work closely with a Senior Wealth Manager to review and manage client portfolios
- Conduct research and recommend selections after consideration of IPS and client risk tolerance.
- Effectively communicate investment sector/industry knowledge to the Wealth Manager and clients.
- Prepare financial plans, reports, proposals and client review presentations as required
- Engage in activities designed to grow and enhance the firm, including client meetings, marketing events, seminars, road shows etc.
- Assist in the development of new business and prospecting
- Other duties as assigned

To qualify for this opportunity you must possess:

- Completion of an undergraduate university degree, preferably in commerce / business with a specialization in finance, accounting or economics.
- CFA or CFP designation or CFA level 3 candidate.
- A minimum of 1-3 years of experience in financial industry.
- Proficiency in researching and building financial models and portfolios
• A good understanding of the financial markets, the factors that influence stock prices, and how these factors impact the particular pricing of a stock
• A passion for the equity capital markets.
• Excellent leadership skills.
• Highly effective and creative written and verbal communication skills.
• Strong technical/computer skills: spreadsheets, graphs, presentations, data searches.
• Strict attention to detail.
• The ability to multi-task and prioritize.
• Flexibility to work long hours when necessary to meet time-sensitive deadlines.
• Outgoing personality with the ability to fit into a team-oriented environment.
• Well-developed interpersonal skills.
• The ability to exercise tact and discretion.
• A valid driver’s licence

This is an exciting role with great potential for growth. If you’d like an excellent opportunity in financial services, please send a cover letter and your resume to:

Raymond James Ltd.
310-200 Consumers Road
North York, ON M2J 4R4

e-mail to lisay.zhu@raymondjames.ca

We would like to thank all interested respondents, but wish to let you know that we will only be contacting applicants that are aligned with our requirements.

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.