

Associate Investment Counsellor

THE ROLE

QV is seeking to hire an Associate Investment Counsellor to help manage and grow its private wealth business. Under the mentorship of an Investment Counsellor, this individual will meet with existing and prospective private clients to discuss their needs, make portfolio recommendations, and review their performance and market developments. The successful candidate will be expected to learn and adopt QV's investment philosophy and process, while embracing QV's team-based culture, supporting an environment of mutual respect and shared rewards.

WHO WE ARE

QV Investors is an employee-owned, discretionary investment management firm managing portfolios on behalf of institutional and private clients. QV is committed to investing, supporting, and empowering our people. Founded in 1996, QV stands for "Quality" and "Value", characteristics that resonate through the firm's culture and investment principles.

VISION, MISSION, AND VALUES

Our mission is to provide exceptional investment management by constructing portfolios that grow income and capital while minimizing the risk of loss. To achieve this, we continuously invest in our people and offer regular communication to all our stakeholders. Providing excellence in investment management and client service along with the best security selection, portfolio management, and communications for our clients is our key vision. We achieve both our vision and mission through the values that make up the core of our firm.

These values include:

- **Clients First:** Our clients' success defines our success.
- **Integrity:** We operate with candor, respect, and professionalism.
- **Excellence:** Through continuous improvement, we strive for excellence in everything we do.
- **Teamwork:** Working towards shared goals gives us strength to achieve more.
- **Accountability:** As owners, we hold ourselves to a higher standard.

Position at a Glance

Role: Associate Investment Counsellor / Client Relationship Manager (Private Clients)

Hours: Full-time | 40hrs/week

Location: Hybrid; Remote and On-site at our Calgary office, some off-site locations as required (meetings/events)

Salary: Market

Start Date: Negotiable

To apply, send your resume and cover letter to:
careers@qvinvestors.com

Closing Date:
4:00PM MDT, Aug 16, 2024



MAIN RESPONSIBILITIES

Relationship Management

- Conduct comprehensive client discovery and planning to define and execute appropriate investment policy
- Meet with clients to review investment performance, goals, and asset mix and recommend necessary adjustments
- Communicate QV's investment philosophy, market developments and actions within QV's investment strategies
- Adhere to appropriate processes, investment policy and regulatory guidelines

Business Development

- Assist in growing QV's direct private client business and third-party advisory business
- Meet with QV's private clients' key partners to strengthen relationships
- Further develop a network of centres of influence to provide referrals to QV's private client business
- Promote QV through industry and community networking opportunities, including social media

Coordination with QV's Team

- Work collaboratively in ensuring QV's clients' needs are met by utilizing QV's other team members where necessary

CANDIDATE REQUIREMENTS

What we're looking for:

Professional

- 4 + years of relevant experience, dealing successfully with a wide array of client needs
- Proven business development experience
- Strong communications and presentation skills
- Strong organization and time management skills, with superior attention to detail
- Ability to be registered with the Alberta Securities Commission (or equivalent, in other provinces) as an Associate Advising Representative or Associate Advising Representative - Client Relationship Manager
- Ability to work both independently and cohesively with others, with proven history of taking on leadership positions
- Financial planning and/or private client management experience would be considered an asset

Educational

- Bachelor's Degree
- CFA® or CIM® designation
- CFP® or other wealth management designations would be considered an asset

Who you are:

- An individual dedicated to pursuing excellence, continuous improvement, and self-leadership
- A professional with an abiding curiosity for investing, people, and business
- Have the flexibility to travel for client meetings and events



WHAT WE PROVIDE

- A hybrid work environment
- A competitive salary that reflects industry level
- A comprehensive health benefits program and access to confidential family assistance services
- Seven personal “Quality” (Q) days, with pay, per annum to provide flexibility and support to the personal well-being of our team members
- A central office location with secure bike storage and on-site gym access with complimentary fitness classes offered
- QV’s Short-Term Bonus Plan
- The opportunity to participate in equity ownership of the firm

COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION

QV actively fosters an inclusive culture that values individuals from all walks of life. Fostering an inclusive culture begins with the hiring process and continues through the employment experience. We strive to break down barriers – and to have a workplace where diversity in experiences, backgrounds, cultures, ideas, and opinions are not just welcomed but celebrated. We want every team member to feel at home at QV. The diversity they each bring contributes to a great workplace, excellent service for our clients, rewarding and fulfilling careers... and a successful business!

To that end, we are committed to recruiting, hiring, training, and promoting qualified people of all backgrounds, and providing accessible employment practices.

To apply, e-mail your cover letter and resume to careers@qvinvestors.com with the heading “Associate Investment Counsellor”. Candidates without cover letters may not be considered.

Alternatively, candidates may forward their cover letter and resume to:

**QV Investors Inc.
Attn: Hiring Committee
Suite 1008, 222 - 3rd Avenue, S.W.
Calgary, AB T2P 0B4**

We thank all applicants in advance and advise that only candidates selected for an interview will be contacted.