

## Private Wealth Associate

### THE ROLE

A Private Wealth Associate supports QV's investment counsellors, as well as its operational and compliance teams, helping to ensure client service excellence and accurate processing of data. Preference will be for individuals with administrative experience in the investment industry. The successful candidate will be expected to embrace QV's team-based culture, which supports 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:** Private Wealth Associate

**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](mailto:careers@qvinvestors.com)

**Closing Date:**  
**4:00PM MST, Feb 7, 2025**



## MAIN RESPONSIBILITIES

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### Client Administration

- Preparation of client update documentation
- Assist in transitioning accounts and onboarding new clients
- Respond promptly to client requests in a courteous manner
- Maintain data integrity through data entry and review across different databases
- Support general client and office administration as needed

### Support Investment Counsellors

- Coordinating and attending client meetings with Investment Counsellors
- Preparing portfolio reports and charts in advance of client meetings
- Assisting with ad-hoc requests on a timely basis
- Working effectively within various teams, striving for honest, direct and clear communication

## CANDIDATE REQUIREMENTS

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### What we're looking for:

#### Professional

##### *Required*

- Minimum 2 years of direct client service experience

##### *Considered a strong asset*

- Canadian Securities Course or similar qualification (or willingness to obtain within first year)
- Working experience within the investment industry and with financial custodians
- University Degree or College Diploma in business, accounting, economics or finance

### Who you are:

##### *An individual with...*

- Superior attention to detail
- Excellent time management skills with ability to manage competing priorities
- Strong communication and client service skills
- Drive to find solutions
- Strong interpersonal skills with ability to understand context
- Solid work ethic and self-motivation
- Above average computer skills and ability to work with databases
- Desire to pursue excellence through continuous improvement and self-leadership



## WHAT WE PROVIDE

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- A hybrid work environment
- A competitive compensation package that reflects industry level
- A comprehensive health benefits program and access to confidential family assistance services
- Five 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 complimentary secure bike storage and on-site gym access with fitness classes offered

## DIVERSITY

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Varied perspectives and skillsets have the potential to enhance decision making, promote continuous improvement and enrich our collaborative culture. Diversity in many forms (including but not limited to diversity in experiences, backgrounds, cultures and ideas) is therefore considered alongside an unbiased assessment of merit and qualifications when seeking the best possible candidate for each employment opportunity.

Teamwork is a key tenet of our culture; we strive to ensure all QV'ers feel empowered to use their diverse perspectives and experiences in pursuit of our shared goals. We provide all individuals in all roles with opportunities to learn, grow, and benefit from an environment of mutual respect.

**To apply, e-mail your cover letter and resume to [careers@qvinvestors.com](mailto:careers@qvinvestors.com) with the heading “Private Wealth Associate”. Candidates without a cover letter may not be considered.**

**Alternatively, candidates may forward their application packages to:**

**QV Investors Inc.  
Attn: Hiring Committee  
Suite 1008, 222 - 3<sup>rd</sup> 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.**