

(Associate) Investment Counsellor

THE ROLE

QV is seeking to hire an Associate Investment Counsellor or Investment Counsellor to help manage and grow our private wealth business. This individual will meet with existing and prospective private clients to discuss their needs, make portfolio recommendations, review their performance and address market developments. In seeking the best possible long-term fit for our team, QV is open to hiring at the Associate or Investment Counsellor level, depending on the individual's experience. 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 / Investment Counsellor (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 MST, Feb 14, 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, providing recommendations for 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 investment counselling 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 Advising Representative
- 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 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 secure bike storage and on-site gym access with complimentary fitness classes offered

DIVERSITY

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 with the heading "Associate Investment Counsellor" or "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.

