

JOB OPPORTUNITY

Position: Marketing Support Analyst (Bilingual – English and French)
Department: Managed Assets
Job Term: Full Time

Overview

As a member of the *Beutel Goodman Client Service Team*, the *Marketing Support Analyst* will be a key internal contact for investment advisors and individual investors and will be active in business development initiatives for SMA wrap mandates and mutual funds. The successful candidate will be able to demonstrate a track record of exemplary customer service, have strong verbal and written communication skills, thrive within a goal-oriented team environment and be able to work independently at times.

Responsibilities/Accountabilities:

1. Promptly respond to requests and inquiries from investment advisors and individual investors. Research appropriately, resolve issues accurately and document all communications. This includes responding to all inquiries received in French (e-mail, telephone, and fax).
2. Partner with *Regional Sales Directors* to develop and nurture relationships with investment advisors from across Canada:
 - a. Ability to confidently engage advisors in detailed conversations regarding our strategies, competitors and capital markets.
 - b. Support the *Regional Sales Directors* in an analytical capacity- prepare product comparisons and competitor research as requested.
 - c. On a daily basis, alert *Regional Sales Directors* to significant sales and redemptions.
 - d. Participate in bi-weekly sales meetings.
 - e. Contribute sales ideas to help grow our business.
3. Co-ordinate the production of monthly mutual fund/SMA profiles and updates.
4. Execute monthly e-mail campaigns through CRM database.
5. Update marketing presentations on a quarterly basis.
6. Regularly generate asset and sales reports for internal reporting purposes.

7. Stay up-to-date on our investment strategies and be cognisant of current events in the capital markets.
8. Be responsible for the completion of special projects as assigned.

Qualifications:

- At least two years of sales or client service experience in the financial industry.
- Successful completion of the Canadian Securities Course a minimum.
- Enrollment into CFA, CFP, CIM, or MBA program will be considered an asset.
- Proficient in Outlook, Excel, Word, Powerpoint.
- Bilingual in English and French

To apply, send your resume to careers@beutelgoodman.com