

JOB OPPORTUNITY

Position: Intern, Private Client Group

Reporting to: Supervisor, Private Client Group

Term: 4 months – Summer [May to Aug]

Location: 20 Eglinton Ave West, Toronto

Overview

The Private Client Group Intern will work with Associates and Portfolio Managers in support of high-net-worth clientele within the Beutel Goodman Private Client Group (PCG). The Intern will assist the team on administrative matters in relation to clients and will be responsible for providing timely and high-quality service. They will be exposed to a fast-paced environment within the duration of their 4-month internship, allowing themselves to immerse themselves into the role.

Key Responsibilities

- This individual will work with internal and external community partners and serve as a catalyst for conversation with Indigenous people, communities and organizations
- Onboard new accounts and ensure that all mandatory documentation is organized and complete
- Support in the maintenance of client documentation to comply with regulatory requirements and internal compliance procedures
- Maintain account-related information in the CRM database
- Reconcile cash balances and asset positions with custodial records
- Respond to inquiries from clients, custodians, and coworkers in a timely and professional manner
- Assist in production of periodic (monthly/quarterly) and ad hoc client reports, presentations, and projects
- Provide support for other team members
- Perform related duties as assigned

Requirements

- The ideal candidate will be currently in 3rd year university, going into their 4th year
- Pursuing a university degree in Finance, Business, Economics, or a related degree.
- Interest in pursuing your CFA designation
- Excellent verbal and written communication skills
- Proficiency with Microsoft Excel, PowerPoint, and Outlook
- Knowledge of SS&C Pacer program is an asset
- High data input accuracy and exceptional attention to detail
- Ability to prioritize tasks and work well under pressure to meet tight deadlines
- Strong personal initiative combined with excellent analytical and problem-solving skills
- Team player with a positive attitude

This posting is for a current vacancy in our **Private Client Group**. To apply, send your resume to **careers@beutelgoodman.com**.

If you require any accommodation during the recruitment process, please email us at **hr@beutelgoodman.com**. A member of our HR team will reach out to you.