



Career Opportunity

Portfolio Manager

Portfolio Manager

BCV Asset Management Inc. provides portfolio management services to high-net-worth families and investors. As a newly integrated standalone subsidiary of ATB Financial, BCV is a growing investment firm based in Winnipeg that manages over \$7 billion in client assets. After 19 years in business, our firm's award-winning culture is built around investment strategy, excellence in client service, and long-term business relationships.

BCV is seeking an experienced, client-focused Portfolio Manager to join our collaborative and collegial investment team. In this dynamic role, you will help generate and evaluate investment opportunities, build and manage client portfolios comprised of equity and fixed income securities, as well as develop and enhance client and referring party relationships. If you want to thrive in a growing organization by building trusted relationships, constructing thoughtful portfolios, and communicating investment ideas with clarity and conviction, BCV is where you can make a meaningful impact.

Role and Responsibilities:

We describe the responsibilities of a Portfolio Manager in three words-Research. Manage. Communicate.

Research:

- Generate and evaluate investment ideas across equities and fixed income.
- Build deep sector expertise and recommend names for BCV's proprietary products and models.
- Contribute to the investment decision-making process as a member of the Investment Committee.
- Produce insightful commentary and periodic investment reports to inform clients and advisors.

Manage:

- Serve as the fiduciary for dedicated referring parties and clients, accountable for overseeing portfolio strategy.
- Translate and distill complex financial analysis into simple, actionable guidance.
- Design and implement customized asset allocations consistent with client objectives and BCV's investment principles.
- Oversee trading, rebalancing, and compliance to ensure portfolios meet internal risk and regulatory standards.

Communicate:

- Build and nurture referring party and client relationships through regular portfolio reviews and thought leadership.
- Create and deliver high-impact investment materials and proposals.
- Represent BCV at industry events, panels, and client forums to amplify our investment philosophy and grow

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referral channels.

Critical Knowledge, Skills and Abilities:

- Comfortable leading portfolio construction, trading oversight, and compliance processes.
- Excellent client relationship and communication skills, with a consultative, fiduciary mindset.
- Proven track record in portfolio management for high-net-worth clients or similar mandates.
- Strong equity research skills and demonstrated sector expertise.
- Strong sense of accountability to colleagues and clients.
- Exceptional interpersonal, communication, and collaboration skills, with the ability to work effectively across teams and engage stakeholders at all levels.
- Competence in Google Workspace and Microsoft Office Suite, with savviness in Excel.

Educational Requirement:

An undergraduate degree as well as the Chartered Financial Analyst designation or presently a CFA 2 level candidate who is currently registered as an Advising Representative and/or an Associate Advising Representative. A CIM designation in lieu of the CFA charter will also be considered.

Just the start of what BCV can offer:

- Financial Wellness: Highly competitive compensation, profit sharing, and pension plan.
- Health and Balance: A comprehensive suite of health, wellness, and flexible benefits.
- Career Growth: Strong educational support and professional development.
- A Taste of the Good Life: Yes, we have a weekly office chef! And much more.

Not checking every box?

Sounds like the job for you but you don't think you have what it takes on paper? Reach out to us anyway!

We are committed to diversity and inclusion and welcome applications from all genders, all cultures, persons with disabilities, and persons of all sexual orientations.

If you possess the above skills and traits, and desire to grow and make a difference with our amazing local company, we invite you to learn more about this exciting opportunity. Please submit your resume and cover letter in confidence to Kimberly Wallace, Director, People and Culture at careers@bcvfinancial.com.

If you require accommodation for the recruitment process, please let us know when you submit your application.

We sincerely appreciate your interest and thank all applicants, however, only those selected for an interview contacted.

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bcv BCV Asset Management Inc.