

## Investment Counsellor

Location: Winnipeg, MB  
Department: Business Development  
Reports To: Executive Vice-President

### About Cardinal

Cardinal Capital Management is an employee-owned, Winnipeg-based investment firm providing discretionary portfolio management and personalized wealth advisory services to high-net-worth families, foundations, corporations, and institutional clients. Our reputation is built on disciplined investment management, integrity, and long-term client relationships. We are committed to delivering exceptional outcomes for our clients while fostering a collaborative, professional, and inclusive workplace.

### Position Summary

We are seeking an experienced and motivated Investment Counsellor to join our growing team. This role combines portfolio management, client advisory, and business development responsibilities. The successful candidate will be responsible for developing and managing long-term client relationships, delivering customized investment solutions, and contributing to the firm's continued growth. This position requires strong investment expertise, exceptional communication skills, and a commitment to the highest ethical and professional standards.

### Key Responsibilities

- Build and maintain long-term, trusted client relationships.
- Manage and advise on client portfolios in line with Cardinal's investment philosophy and IPS guidelines.
- Conduct regular client reviews and provide ongoing financial guidance.
- Identify and pursue new business opportunities through networking and referrals.
- Prepare and present customized investment proposals.
- Collaborate with internal teams and external advisors to deliver exceptional client service.
- Ensure compliance with regulatory requirements and internal policies.
- Maintain accurate client records and CRM documentation.

### Skills & Attributes

- Strong ethical foundation and commitment to fiduciary duty.
- Excellent communication, presentation, and relationship-building skills.
- Strong analytical, organizational, and problem-solving abilities.
- Professional, accountable, and client-focused mindset.
- Ability to manage multiple priorities in a fast-paced environment.
- Proficiency with CRM systems, Microsoft Office, and financial applications.

### Qualifications & Requirements

- Bachelor's degree in Finance, Business, Economics, or related field.
- 5+ years of experience in investment management or financial services.
- CIM designation, CFA Charterholder, or CFA candidate preferred.
- Registration (or eligibility) as an Advising Representative or Investment Counsellor.
- Strong understanding of portfolio management and financial planning.
- Clean regulatory record.

### Compensation & Benefits

- Competitive base salary and performance-based incentives.
- Comprehensive health, dental, and wellness benefits.
- RRSP matching.
- Professional development and certification support.
- Collaborative and supportive work environment.

### Career Development

This role offers long-term growth opportunities, and Cardinal actively supports ongoing education and professional development.

### Our Commitment to Inclusion

Cardinal Capital Management is committed to fostering an inclusive, diverse, and accessible workplace. We encourage applicants of all backgrounds, cultures, genders, and abilities to apply.

### How to Apply

If this opportunity aligns with your experience and career goals, please email your résumé and cover letter in confidence to: [enquiries@cardinal.ca](mailto:enquiries@cardinal.ca)

*We thank all applicants for their interest. Only those selected for an interview will be contacted.*