

## Portfolio Manager

BCV Asset Management Inc. provides portfolio management services to high-net-worth families, corporations, and institutional investors. We are a growing investment firm, based in Winnipeg, that has completed its seventeenth year of business and that manages over \$5 billion in client assets. Our firm is built around an award-winning culture, investment performance, excellence in client service, and long-term business relationships.

As an integral member of this dynamic and collegial team, you will have a demonstrated record of achievement. 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 advisor relationships.

## Tasks, Role & Responsibilities:

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

### Securities Research:

- Perform fundamental research on equity and fixed income securities across multiple sectors, reviewing securities that are currently in portfolios and identifying securities for investment consideration.
- Maintain an awareness of economic, financial market and investment conditions that impact the companies in which we invest and capital markets as a whole.
- Create written research material.
- Contribute to the investment decision-making process as a member of the Investment Committee.

### Portfolio Management:

- Adhere to BCV's investment style, focusing on dividend-growing, blue chip value equities and corporate fixed income securities, while demonstrating a personal alignment with this style.
- Execute portfolio transactions within the guidelines of individual client Investment Policy Statements.
- Contribute to bulk trading and allocations across multiple accounts.
- Incorporate a comprehensive understanding of the regulatory environment in which BCV operates.

### Communication:

- Demonstrate a comprehensive understanding of our clients and alignment with BCV's service offering.
- Identify and develop new business opportunities with advisors and clients.
- Contribute to new marketing materials as necessary.
- Present detailed proposals to prospective advisors and clients.
- Work in conjunction with advisors and clients to assist in achieving their financial goals and plans.

## Critical Knowledge, Skills and Abilities:

- Ethical grounding with an understanding of fiduciary responsibility.

**Research. Manage. Communicate**

- Strong sense of accountability to colleagues and clients.
- Entrepreneurial spirit with a willingness to take initiative.
- Open-minded, willing to learn and commitment to improving the team culturally.
- Exceptional communication and interpersonal skills.
- Tech savvy, advanced proficiency in Microsoft Office and investment management applications.
- Commitment to ongoing education and professional development.
- 5+ years of related work experience in the financial services industry, with an unblemished record of regulatory compliance.

### **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:**

- A comprehensive suite of Health Care & Wellness benefits.
- Strong educational support and professional development.
- Highly competitive compensation and profit sharing.
- RRSP matching, weekly chef, and much more.

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, Manager, People and Culture at [kwallace@bcvfinancial.com](mailto:kwallace@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 will be contacted.

**Research. Manage. Communicate**

**bcv** BCV Asset Management Inc.