

## **JOB DESCRIPTION**

### **Executive Assistant, Investment Team**

### **Toronto, Ontario**

#### **Background**

Burgundy Asset Management Ltd. is a leading global investment manager providing discretionary investment management for private clients, foundations, endowments, pensions, and family offices. Founded in 1990, Burgundy strives to protect and build our clients' wealth over the long term. Burgundy is fully independent, and employee owned.

#### **Position Summary**

This is an exciting opportunity to be part of a fun and dynamic team. Working directly with the portfolio managers you will be responsible for working closely with the U.S. Small Cap Team, the Canadian Large Cap Team, and the Canadian Small Cap team to support its investing agenda, as well as work with other investment teams when necessary. This individual will be required to provide efficient, accurate and value-added support to the teams, as well as assist and work with the other executive assistants.

#### **Responsibilities**

- Arrange travel and company meetings. The Executive Assistant needs to be persistent in securing meetings with the senior management of companies. Some companies will not be familiar with Burgundy Asset Management Ltd. He or she needs to be able to sell Burgundy in a polished and assertive manner to get the most senior management for these meetings.
- When booking travel, the Executive Assistant needs to determine the most efficient and effective route with minimal supervision.
- The Executive Assistant needs to be an excellent communicator, making sure that both internal and external communications are delivered in a timely and concise manner.
- The Executive Assistant needs to be competent with using systems like Bloomberg and Capital IQ. They need to be confident in learning new systems and exploring ways to make their team's lives and travel more efficient (i.e., looking for new apps that may improve note taking etc.).
- The Executive Assistant needs to be proficient in retrieving broker reports and any relevant research material (10Ks, transcripts, annual reports, etc.) in a timely manner. They need to know how to download and manage documents on Drop Box etc.
- The Executive Assistant will also take care of some personal matters for the Senior Portfolio Managers (i.e., filing, booking family vacations etc.).

- In addition to the above responsibilities, the Executive Assistant needs to be able to maintain calendars and contact lists, filing, database management, expense reports, correspondence, sorting incoming mail etc.

## Key Requirements

- Strong proficiency in Microsoft Office (Word, Excel, PowerPoint, Outlook, etc.) and internet search resources
- Canadian Securities Course or a willingness to pursue this

## Other Attributes

- Detail oriented
- Ability to multi-task and anticipate outcomes
- Highly organized
- Excellent communication and interpersonal skills
- Tactful and confidential in all dealings
- Collaborative and collegial attitude
- Willing to take on added responsibilities as he or she gets to know and understand the business

## Application / Interview Process

All interested candidates should submit the following to: [careers@burgundyasset.com](mailto:careers@burgundyasset.com) with the job title (Executive Assistant, Investment Team) in the email subject line, by 5:00 p.m. EST. on May 1, 2022.

- Resume
- Cover letter
- In 350 words describe an example of when you had competing deadlines and the steps you took to manage expectations across multiple stakeholders. Include the challenges you had to overcome and the result.

Interviews will happen after the applications are reviewed. We thank all applicants for their interest, please be advised that only those selected for an interview will be contacted.

*Burgundy Asset Management Ltd. is an equal opportunity employer. Accommodations based on disability, and other accommodations as required by the Ontario Human Rights Code, are available on request at all stages of the selection process and during employment.*