

POSITION OVERVIEW

Organization: Burgundy Asset Management Ltd

Title: Account Administrator, Canadian Private Client Group

Reports to: Vice President, Private Client Operations

Location: In person/on-site 181 Bay Street, Suite 4510, Toronto, ON, M5J 2T3

Role: Replacement Hire

ABOUT BURGUNDY ASSET MANAGEMENT LTD

Burgundy Asset Management Ltd is a division of BMO Financial Group. Within BMO Wealth Management, Burgundy functions as an independent line of business. Burgundy Asset Management Ltd is a global investment manager providing discretionary investment management for private clients and institutions. Founded in 1990, we invest with a long-term, fundamental approach - building concentrated portfolios of high-quality businesses to protect and compound clients' capital over time.

Our culture is grounded in honesty, courage, and doing what is right for our clients - and we look for candidates who share these values.

POSITION SUMMARY

This is an exciting opportunity to be part of a fun and dynamic team. Reporting to the Vice President, Private Client Operations, you will be responsible for supporting the Canadian Private Client Group, specifically by processing new account documentation, assisting in the preparation for client meetings, and other administrative tasks. You will work closely with the Canadian Private Client Group in our Toronto office to support their initiatives as well as with other internal groups when necessary.

KEY RESPONSIBILITIES

- Develop strong relationships and provide support to the Canadian Private Client Group (PCG).
- Collaborate and liaise with the PCG and more broadly within the firm to complete PCG responsibilities.
- Process account opening documentation, including gathering required approvals.
- Process know your client (KYC) documentation.
- Ensure the client relationship management (CRM) system is updated and well maintained.
- Save/file client documentation.
- Assist with recurring internal reporting.

- Provide support for preparation of client materials for investment review meetings, including printing.
- Ensure printed materials are kept up to date.

WHAT WE'RE LOOKING FOR

The ideal candidate will be/have:

- Exceptional organizational skills.
- Strong attention to detail.
- Proficiency in Microsoft Office applications (Word, Excel, PowerPoint, Outlook, etc.) and adeptness in utilizing internet search resources.
- Ability to multitask within tight deadlines.
- Motivated towards achieving and exceeding goals.
- Basic understanding of financial account types, including registered plan accounts.
- Excellent interpersonal skills, with a proven ability to work effectively within teams.
- Demonstrates tact and discretion while handling confidential information.
- Collaborative and collegial attitude, promoting a positive and supportive work environment.
- Willingness to embrace additional responsibilities as they become acquainted with and comprehend the intricacies of the business.
- Undergraduate degree.
- Completion of or a willingness to pursue the Canadian Securities Course (CSC).

WHY BURGUNDY

At Burgundy, our culture is grounded in personal responsibility. We thrive in an environment where we are continuously learning and improving in service to our clients and one another. This is a great opportunity to be part of a fun and dynamic team.

- Work in person, for a dynamic, fast-paced, progressive and high performing team.
- Leaders who will support your development through coaching and mentoring.
- Access to future career opportunities.
- Opportunities to do challenging work.
- Ability to make a difference and have a lasting impact.

SALARY

Salary: \$55,000-\$68,000, depending on experience, plus a highly competitive annual incentive plan aligned with performance.

Pay Type: Salaried.

The above represents BMO Financial Group's pay range and type. Salaries will vary based on factors such as location, skills, experience, education, and qualifications for the role, and may include a commission structure. Salaries for part-time roles will be pro-rated based on number of hours regularly worked. For commission roles, the salary listed above represents BMO Financial Group's expected target for the first year in this position.

BMO Financial Group's total compensation package will vary based on the pay type of the position and may include performance-based incentives, discretionary bonuses, as well as other perks and rewards. BMO also offers health insurance, tuition reimbursement, accident and life insurance, and retirement savings plans. To view more details of our benefits, please visit: <https://jobs.bmo.com/global/en/Total-Rewards>

HIRING PROCESS TIMELINE

Interested candidates are encouraged to apply by March 25, 2026.

Kindly send your resume and cover letter via email to: careers@burgundyasset.com, using "Private Client, Account Administrator" in the subject line. Interviews take place throughout April 2026.

We thank all applicants for their interest; however, only those selected for an interview will be contacted.

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ABOUT BMO

At BMO we are driven by a shared Purpose: Boldly Grow the Good in business and life. It calls on us to create lasting, positive changes for our customers, our communities and our people. By working together, innovating and pushing boundaries, we transform lives and businesses, and power economic growth around the world.

As a member of the BMO team you are valued, respected and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one – for yourself and our customers. We'll support you with the tools and resources you need to reach new milestones, as you help our customers reach theirs. From in-depth training and coaching to manager support and network-building opportunities, we'll help you gain valuable experience and broaden your skillset. To find out more visit us at <https://jobs.bmo.com/ca/en>.

BMO is committed to an inclusive, equitable and accessible workplace. By learning from each other's differences, we gain strength through our people and our perspectives. Accommodations are available on request for candidates taking part in all aspects of the selection process. To request accommodation, please contact your recruiter.

Note to Recruiters: BMO does not accept unsolicited resumes from any source other than directly from a candidate. Any unsolicited resumes sent to BMO, directly or indirectly, will be considered BMO property. BMO will not pay a fee for any placement resulting from the receipt of an unsolicited resume. A recruiting agency must first have a valid, written and fully executed agency agreement contract for service to submit resumes.