

POSITION OVERVIEW

Organization: Burgundy Asset Management Ltd

Title: Account Manager

Reports to: Senior Manager, Client Accounts

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

Role: New vacancy

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

The Account Manager supports Investment Counsellors in managing an assigned book of client accounts, ensuring operational excellence and a high standard of client service. This role oversees core account administration activities and delivers timely and accurate client support. Acting as a key liaison with internal teams, the Account Manager contributes to seamless client service and continuous process improvement.

KEY RESPONSIBILITIES

- Develop strong relationships and support Investment Counsellors by overseeing account management activities for an assigned book of client accounts.
- The primary activities of this role include account onboarding, account transfers, transaction processing, registered account management, client reporting, and the maintenance of accurate client records.
- Deliver comprehensive client support by responding to inquiries, providing portal assistance, and ensuring timely and accurate distribution of reports and documentation.
- Maintain a comprehensive knowledge of financial account types and their functions, along with the regulatory requirements governing registered plans, to ensure accurate administration and compliance across all account activities.
- Apply a solid understanding of estate settlement processes to effectively support clients.

- Serve as a liaison with third-party advisors and custodians to address inquiries and resolve issues efficiently.
- Contribute to department initiatives and projects to support operational improvements and team objectives.
- Collaborate with team members to fulfill responsibilities and provide coverage during peak periods and absences.

WHAT WE'RE LOOKING FOR

- Highly organized and detail-oriented, with the ability to multi-task within tight timelines.
- A creative problem-solver, with effective written and verbal communication skills.
- Excellent interpersonal skills, with a proven ability to collaborate within a team.
- Demonstrates discretion in handling confidential information.
- Proficient in Microsoft Office applications (Excel, Word, Outlook).
- Minimum of 3 years of experience in financial services.
- Post-secondary degree.
- Completion of the Canadian Securities Course (CSC) is considered an asset.

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: \$65,000-\$84,500, 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 31, 2026.

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