

Position Overview:

Organization: Burgundy Asset Management Ltd

Title: Associate, Institutional Team

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

Salary: \$65k - \$100k, depending on experience, with annual performance eligibility.

Role: This posting is for a current vacancy on Burgundy's Institutional Team

Come to work at Burgundy!

Burgundy Asset Management is part of BMO Financial Group. Burgundy Asset Management is a 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.

At Burgundy, our values of honesty, courage, and always doing what is in the best interest of the client are brought to life by the daily actions of our people. No matter the position, the right candidate shares our values and understands that everything we do, great or small, is in service of our clients.

The Position

You will be responsible for supporting outstanding client service as well as contributing to day-to-day reporting needs, business development projects and global databases used by consultants around the world. You will work closely with the Institutional group in our Toronto office to support their initiatives as well as other internal groups when necessary.

This role is a great opportunity to collaborate with the Institutional Relationship Managers to provide outstanding client experience as well as to contribute towards prospect and business development opportunities. This is a dynamic role that will result in extensive knowledge of Burgundy's investment approach and business operations.

Responsibilities

- Develop a deep understanding of the firm, investment philosophy and investment strategies
- Analyze and interpret internal and external data
- Develop strong relationships and provide support to Institutional Client teams to generate high quality client and prospect materials
- Draft, review and submit RFPs (request for proposal), RFIs (request for information) and DDQs (due diligence questionnaire) for Institutional clients and prospects
- Complete monthly and quarterly client/consultant requests, ranging from data submission to portfolio analysis and updating consultant databases
- Collaborate and liaise within the team and more broadly within the firm to complete team responsibilities, such as presentations and systems projects

Skills and Specifications

The ideal candidate will be:

- 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
- Adept at building and maintaining strong relationships with colleagues
- Timely and efficient with both individual and collaborative tasks
- Highly motivated towards achieving and exceeding goals
- Highly proficient with Microsoft Office, particularly with PowerPoint and Excel

Qualifications

- Bachelor's Degree
- Experience in the financial industry an asset
- Fluently bilingual in French and English an asset
- Actively pursuing the Chartered Financial Analyst (CFA) designation

Required Qualifications

- Minimum 2 years of investment and financial services (or related) industry experience.
- Post-secondary degree.
- Chartered Financial Analyst (CFA) designation, Financial Planning (CFP) designation or willingness to pursue.

If this sounds of great interest to you, please send your resume and cover letter to: careers@burgundyasset.com referencing the job title (Associate, Institutional Group) in the email subject line. The deadline to apply is January 9, 2026.

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 on the basis of 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.