BURGUNDY
ASSET MANAGEMENT LTD.

Position Overview:
Organization: Burgundy Asset Management Ltd
Title: Associate, Canadian Private Client Group
Reports to: Vice President, Private Client Operations, Private Client Group
Location: In person/on-site @ 181 Bay Street, Suite 4510, Toronto, ON, M5J 2T3
Salary range: $65K–$100K, depending on experience, with annual performance bonus eligibility.
This posting is for a current vacancy on Burgundy's Private Client 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
Reporting to the Vice President, Private Client Operations, you will be responsible for supporting the Investment Counsellors, contributing to day-to-day administrative needs, and providing exemplary client service. You will work closely with the Canadian Private Client Group in our Toronto Office to support their initiatives as well as other internal groups when necessary.

What is in it for you?
At Burgundy our culture is one of radical 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 collaborate with Investment Counsellors to provide outstanding client experiences as well as to contribute towards business development opportunities. This is a dynamic role that will result in extensive knowledge of Burgundy's investment approach.

- 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.

Responsibilities
- Develop a deep understanding of the firm, investment philosophy and investment strategies.
- Develop strong relationships and provide support to Investment Counsellors to generate high quality client and prospect materials, including preparation for investment review meetings and processing annual know-your-client renewals.
- Provide research and marketing support for investment proposals and other requests.
- Work with our client relationship management system to maintain accurate and complete client records, capture client interactions, and document meeting notes.
- Understand the various financial account types, including the information and documents required to hold the accounts, as well as their functions.
- Adhere to compliance policies and procedures, and business rules.
- Collaborate and liaise with the team and more broadly within the firm to complete team responsibilities.

Skills and Specifications
The ideal candidate will be/have:
- Exceptional organizational skills with the ability to prioritize tasks.
- Strong attention to detail.
- Proficiency in Microsoft Office applications (Word, Excel, PowerPoint, Outlook, etc.).
- Ability to navigate within tight deadlines.
- Motivated towards achieving and exceeding goals.
- Excellent interpersonal skills, with a proven ability to work effectively within teams.

- Demonstrate 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 available and comprehend the intricacies of the business.

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, Private Client Group) in the 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.