## POSITION OVERVIEW

**Organization:** Burgundy Asset Management Ltd.
**Title:** Associate, Institutional Team
**Reports to:** Manager, Sustainability and Institutional Services
**Location:** In person/on-site 181 Bay Street, Suite 4510, Toronto, ON, M5J 2T3
**Role:** Current 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 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

Reporting to the Manager, Sustainability and Institutional Services, the Associate will be an integral part of Burgundy's Institutional Team. 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 based in Toronto and requires in-person attendance.

## KEY 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

## WHAT WE'RE LOOKING FOR

The ideal candidate will be:

- highly organized and detail-oriented, with the ability to manage multiple priorities under tight timelines.
- a creative problem solver with strong written and verbal communication skills.
- skilled at building and maintaining strong working relationships.
- efficient and reliable when working independently or collaboratively.
- motivated to achieve and exceed goals.
- proficient in Microsoft Office, particularly PowerPoint and Excel.
- a bachelor's degree holder.
- experienced in the financial industry, which is considered an asset.
- fluent in French and English, which is considered an asset.
- a CFA or CFP designation holder, or willing to pursue one.

## WHY BURGUNDY

At Burgundy, our culture is grounded in personal responsibility. We thrive in an environment where we are continuously learning and improving service to our clients and one another.

Work in person for a 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:** $50,100.00 – $92,300.00 depending on experience, plus a 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](https://jobs.bmo.com/global/en/Total-Rewards)

## HIRING PROCESS TIMELINE

Interested candidates are encouraged to apply by July 31, 2026. Please submit your resume and cover letter here. Interviews will take place throughout July and August 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.*