**Position Overview:**
**Organization: Burgundy Asset Management Ltd.**
**Title: Account Administrator, Canadian Private Client Group**
**Reports to: Senior Manager, Private Client Operations**
**Location: In person/on-site @ 181 Bay Street, Suite 4510, Toronto**

**Come to work at Burgundy!**
Burgundy Asset Management is a leading 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. Burgundy is fully independent, and employee owned.

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 the service of our clients.

**The Position**
This is an exciting opportunity to be part of a fun and dynamic team. Reporting to the Senior Manager, 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.

**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 the entire Canadian Private Client Group to provide outstanding client experiences. This is a dynamic role that will result in extensive knowledge of Burgundy's accounts and operational processes. The environment is fast paced and is filled with learning experiences that will benefit you moving forward.

- 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 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.

**Skills and Specifications**
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.

**Required Qualifications**

- Undergraduate degree.
- 2+ years of financial services experience (administration/client services).
- Completion of or a willingness to pursue the Canadian Securities Course (CSC).

If this sounds of great interest to you, please send the following to careers@burgundyasset.com, referencing the job title (Account Administrator, Canadian Private Client Group) in the subject line, by 5:00 p.m. EDT on Friday, April 26, 2024.

- Resume
- Cover letter
- In 350 words, describe a specific situation in your professional experience where you had to adeptly multitask while maintaining a client-first approach.

We thank all applicants for their interest, and 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.*