

Position Overview:

Organization: Burgundy Asset Management Ltd

Title: Philanthropy Manager

Reports to: Vice President, Private Client Operations, Private Client Group

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

About Burgundy Asset Management Ltd

Burgundy Asset Management Ltd. is a global investment manager providing discretionary investment management for private clients, foundations, endowments, pensions, and family offices. We strive to protect and build client wealth over the long term. Burgundy is registered in all the provinces of Canada as a Portfolio Manager and as an Investment Fund Manager in the provinces of Ontario, Quebec, and Newfoundland & Labrador. Burgundy is also registered as an Investment Adviser with the Securities and Exchange Commission (SEC). Further information about Burgundy can be obtained at: www.burgundyasset.com

Position Summary

Burgundy Asset Management is seeking a highly motivated and detail-oriented Philanthropy Manager to join its Private Client team. The successful candidate will act as an ambassador for the Burgundy Legacy Foundation (BLF) by engaging Burgundy's clients and employees in charitable giving through the BLF. The role will promote the BLF and its mission of inspiring a better world through generosity.

Key Responsibilities

- Management of all aspects of Burgundy's Private Giving Program (donor advised fund program), including liaising with the Private Client team, external charities, and the donor advised funds (DAF) donor/clients.
- Co-ordinating in-kind donations for Burgundy's private clients
- Issuing grants and donation receipts, and completing financial tracking and reporting
- Processing grants for Client Requested Donations
- Acting as a point person for the BLF in the community
- Providing high level support with communications strategy and the creation of both internal and external reports
- Ensuring compliance with the CRA and regulatory filings

- Co-ordinating role for the board and board committees, including preparation of board and committee meeting materials

What We're Looking For

Required

- Bachelor's degree or equivalent work experience
- Familiarity with donor management systems or CRMs
- Background in financial services, wealth management, or client services
- Strong organizational and project management skills with excellent attention to detail and accuracy
- Excellent written and verbal communication skills, with experience preparing reports, board materials, and donor communications
- Proven ability to build and maintain effective relationships with diverse stakeholders (clients, charities, boards, and internal teams)
- High level of professionalism, discretion, and integrity when handling sensitive information
- Proficiency with Microsoft Office Suite (Word, Excel, PowerPoint, Outlook)

Personal Attributes

- Passion for philanthropy and commitment to making a positive community impact
- Collaborative, team-oriented mindset with the ability to work effectively across functions
- Strong problem-solving skills and resourcefulness in navigating complex issues
- Detail-oriented while maintaining the ability to see the big picture
- Adaptable and comfortable balancing multiple priorities in a fast-paced environment
- Empathetic and client-focused, with a service mindset

What We Offer

- A collaborative and intellectually stimulating work environment.
- Competitive compensation and benefits package.
- Opportunities for professional growth and advancement.

Hiring Process Timeline

Interested candidates are encouraged to apply by October 24, 2025.

Kindly submit your application materials via email to: careers@burgundyasset.com using "Philanthropy Manager" as the subject line.

Your application package should include:

- Resume
- Cover Letter

We thank all applicants for their interest; however, 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.