FOYSTON, GORDON & PAYNE INC.

INVESTMENT COUNSEL

JOB POSTING

Client Portfolio Manager/Investment Counsellor

(High-Net-Worth business channel; reporting to the Head of Wealth Management)

Who We Are

Foyston, Gordon & Payne Inc. (FGP) is an investment management firm founded by three entrepreneurs in 1980 and now employs over 40 people, managing approximately $7 billion in assets on behalf of institutional and private clients. Our portfolio managers look for quality and value in Canadian fixed income, Canadian equities, and Global equities, while our hiring managers look for dynamic and highly skilled people to join our organization. We are seeking a qualified person to add to our Wealth Management team.

Advising Representative/Portfolio Manager – Vice President, Client Portfolio Manager

Summary & Responsibilities:

- To service and advise existing high net worth clients using FGPs proprietary Funds and strategies
- To develop new private client business through prospecting, both directly and through networking with external consultant organizations, family offices and other advisory professionals
- To undertake marketing and deliver presentations to clients, prospects, consultants and search committees
- To develop client goal setting, identify risk tolerances and build or revise IPSs
- To oversee on-going implementation of client policies and securities selection within the framework of the portfolio models determined by the firm's asset class managers
- To oversee communications to clients regarding portfolio performance, strategy and asset mix
- To conduct annual (or more frequent) face to face and/or telephone/video reviews with clients (KYCs, AML) and maintain a good level of pro-active communication with clients and/or their external consultants throughout the year
- To provide discretionary client investment portfolio management, acting within clients' policy guidelines and within FGP's portfolio model process and compliance guidelines
- To oversee, monitor and implement rebalancing of client portfolios within the FGP investment framework
- To clearly communicate the firm's investment strategies and security selection process
- To be fluent with current economic and capital markets events
- To work closely with FGP Distribution, Investment and Operations teams in the execution of the highest level of client service
- To mentor Wealth Management Associates and members of the FGP Client Service Team

Position Requirements:

- Brings over 10 years' experience in high-net-worth client relationship management
- CFA or CIM
- Qualified to be registered as an AR/PM in good standing in all Canadian Provinces and Territories.
- Can communicate competently both with clients and with their financial planning, tax and estate advisors.
- Experienced in the use of portfolio management systems and Microsoft Office (Excel, Word and PowerPoint).
- Can accommodate a moderate business travel schedule, to meet with clients, prospects and consultants across Canada

May 2024

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To apply for this position, email your resume and a cover letter to humanresources@foyston.com. Please be advised that only candidates selected for an interview will be contacted. We thank you in advance for your interest.

For more information about Foyston, Gordon & Payne Inc., please visit www.foyston.com.

Foyston, Gordon & Payne Inc. is an equal opportunity employer and is committed to diversity, equity, and inclusion. We are committed to fostering an inclusive, equitable, and accessible workplace where every team member feels valued, respected, and supported. We are committed to building a team that represents a variety of backgrounds, perspectives, and skills. We welcome and encourage applications from individuals with disabilities; accommodations are available at all stages of the recruitment process, at the candidate's request.