WARATAH

Position: Client Team Associate

Type: Full-time

About Waratah Capital Advisors:
Waratah Capital Advisors is an employee-owned investment management firm that specializes in alternative strategies. The firm was founded in 2010 and has grown with an entrepreneurial momentum to 44 team members and assets under management of over $2 billion from private clients, family offices, foundations, Canadian bank platforms, and pension funds.

Description of the Role:
This dynamic role exposes candidates to business development, client service and analysis. You'll work closely with the Client Team to **proactively** increase the prospect pipeline, close new sales and enhance the overall client experience. We're looking for an **independent** and **out-of-the-box thinker**, a **multi-tasker** with **strong attention to detail and follow-up**, **a service-focused attitude** who can **easily adapt** to the fluid needs of the team. The position requires intermediate to advanced investment fund knowledge; experience in the alternative/hedge fund or private equity space is an asset. Polished and professional, the incumbent will be involved in client meetings and presentations. A minimum of 5 years of experience is required.

Key Responsibilities:

- Prepare performance, marketing presentations, RFPs, monthly or quarterly due diligence questionnaires and requests;
- Bring forward new ideas on marketing plans and sales initiatives seeing them through to execution;
- Coordinate, attend and document client and prospect presentations;
- Maintain sales pipelines to improve shared communication and monitor/optimize business development activity while ensuring a high degree of accuracy and reliability of CRM systems;
- Navigate clients through the subscription and new client on-boarding process, assisting in updating KYC information on a regular basis;
- Take ownership of client inquiries and requests tactfully and in a timely manner, escalating to the team where required;
- Build strong and meaningful relationships across a cross-section of industry stakeholders, COIs and investor communities (pension plans, family offices, UHNWI, consultants, etc.)
- Co-ordinate ongoing client and counterparty information requests, liaising with internal departments and external service providers as needed to compile requested information;

Skills Required:

- 5+ years of financial services experience, preferably in a client service or business development role
- Passion for working alongside a high-performance team
- Strong communication skills across all mediums
- Self-starter with a resilient attitude
- Enthusiasm and curiosity to take on new projects and requests with a proven ability to take ownership of work, be resourceful and accountable to achieve results
- A natural connector who is always thinking about adding value to others
- A collaborative, team player who goes the extra mile for clients and teammates
- Tremendous integrity, professionalism and always doing the right thing
- Energized by engaging with new people
- Strict attention to detail, highly organized with the proven ability to set priorities
- Thrive under the pressure of constantly changing deadlines, last-minute requests and able to juggle multiple simultaneous client demands

Educational Requirements:

- Bachelor’s degree required, with a focus on business & finance
- Previous experience with CRM software
- License/Registration/Certification CSC or other industry related-courses preferred.
- CFA Level I or higher an asset