About Waratah Capital Advisors:

Waratah Capital Advisors is an investment fund management firm that specializes in alternative strategies. The firm was founded in 2010 and has grown with an entrepreneurial momentum to 47 team members and over $3 billion assets under management 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 operations and portfolio analysis. This role has considerable responsibilities from day one that will develop soft and hard skills, maximizing your career potential. You'll work closely with the Client Team to proactively service existing clients and enhance the overall experience for the Multi-Family Office and Retail channels. 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. Experience in the alternative/hedge fund or private equity space is an asset. Polished and professional, the incumbent will be involved in almost all activities on the Client Team. Waratah is a rapidly growing firm, and you can expect your role to evolve and grow in scope as your skills develop.

Key Responsibilities:

- Prepare performance, marketing presentations, RFPs, due diligence questionnaires and one-off requests
- Coordinate and document client and prospect presentations
- Maintain industry databases and manage vendor relationships
- Maintain and improve shared communication and monitor/optimize business development activity while ensuring a high degree of accuracy and reliability of CRM systems
- Assist clients through the subscription process
- Take ownership of client inquiries and requests tactfully and in a timely manner, escalating to the team where required
- Conducting competitor research and analysis
- Actively participating in team meetings and discussions
- Co-ordinate ongoing client and counterparty information requests, liaising with internal departments and external service providers as needed to compile requested information
- Special projects as required.

Skills Required:

- Approximately 3 years of experience in the financial services sector, optimally in a client service or inside sales role
- Passion about working alongside a high-performance team
- Strong communication skills across all mediums
- Strict attention to detail, highly organized with the proven ability to set priorities
- 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
- 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 and FundSERV
- Working towards License/Registration/Certification CSC or other industry related courses preferred