

# WARATAH CAPITAL ADVISORS

## **About Waratah Capital Advisors:**

Waratah Capital Advisors is a Toronto-based asset manager that specializes in alternative strategies. Waratah manages over \$3.5 billion in assets from high-net worth individuals, family offices, foundations, Canadian bank platforms, and pension funds. With a team of 50 experienced professionals, Waratah combines intensive research-driven stock selection with a disciplined and robust risk management program. Founders and employees collectively represent over \$123 million of the firm's assets under management

## **Job Title: Client Service Associate**

### **Job Description:**

We are seeking an exceptional individual who is prepared to take on multiple responsibilities to help Waratah Capital Advisors succeed in all business initiatives. Reporting to the VP of Operations, the role of the Client Services Associate will involve working within the operations and client team to achieve daily, weekly, and monthly tasks. The ideal candidate has worked with clients, is self-motivated, detail orientated and ready to make a difference.

### **Key Responsibilities**

- Provide detailed onboarding requirements and assist new and existing clients with any questions regarding the documentation/onboarding process:
  - Obtain and compile client information on the documents.
  - Ensure all documentation is complete, signed and received prior to deadlines.
  - Monitor the incoming and outgoing of funds.
  - Map and grant access to new and existing relationships on the portal
- Ensure clients receive superior service
- Establish strong relationships with new clients and deepen relationships with existing clients
- Assist with general client inquires including:
  - Historical tax slip requests (upload and organize)
  - NAV Statement requests
  - Retail inquires and requests
- Collaborate with clients, operations, and finance teams
- Leverage feedback for continuous improvement to the onboarding process
- Ad hoc request and project work as required.

### **Skills Required:**

- At least 2-3 years of industry experience
- Undergraduate Degree in finance or related field
- Superior communication and interpersonal skills
- High attention to detail
- Ability to work independently and manage multiple priorities
- Microsoft Office skills

To apply for this position, please send your resume to [career@waratahcap.com](mailto:career@waratahcap.com)