

## **Manager – Client Servicing, US & International**

### **Who we are?**

Tracing its history back to 1946, Montrusco Bolton Investments Inc. (“MBI”) is a private investment management firm with CAD 15 billion dollars in assets under management. Our team of investment professionals still shares the same entrepreneurial spirit which drives the way they serve their institutional clients globally. For more information about our firm, please visit our website at [www.montruscobolton.com](http://www.montruscobolton.com)

### **What is the job?**

As our firm continues to flourish in the global market and our international clientele expands, we are seeking a Manager, Client Servicing, US & International to play a pivotal role in elevating our client servicing standards. This is an exciting opportunity to join our dynamic team and contribute to our ongoing evolution. This position offers a full-time, permanent role within our dedicated client servicing team, where you can make a meaningful impact on our existing and future clients' experiences.

Preferred start date: Opening is effective immediately

Work location: 1501 McGill College Avenue, Suite 1200, Montreal (Headquarters)

Direct report: Vice President, Head of Client Servicing – US & International

### **Main responsibilities**

- Develop a relationship of trust with MBI stakeholders; build relationships through both formal and informal meetings.
- Deliver high quality client service and ensure quality of information.
- Assisting in client meetings and presentation materials.
- Develop and maintain a comprehensive understanding of the firm's investment philosophy and strategies.
- Work with cross-functional teams (business development, marketing, operations and investment teams) to meet client needs and MBI requirements.
- Supporting senior team members in managing larger, more strategic client relationships.
- Support the onboarding process for new clients and coordinating with internal stakeholders for a seamless client experience.
- Ensuring compliance with regulatory guidelines and MBI's client servicing best practices.
- Maintaining all activity in the CRM system and ensuring data accuracy.

### **Professional requirements**

- Minimum of 5 years of experience in the investment management industry
  - Experience in client service roles in an institutional environment (investment management firm, pension plans, foundations, consulting firms or other related industries).
  - Experience in financial services or other related industries will also be considered.
- Knowledge of traditional investment strategies and structures
  - Possesses strong investment knowledge, including proficiency in global and U.S. equities.
  - Experience with investment structures such as UCITS and CIT is considered a plus.
  
- Strong ability to support complex client inquiries and collaborate with senior team members
- Academic background
  - Holds an academic background relevant to the role with a university bachelor's degree in an appropriate field; start of CFA designation process considered a plus.

## **Critical Skills**

### Communication Skills

- An effective communicator with strong oral and written skills in English given that a growing part of MBI's clients and partners are located outside of Quebec.
- Strong oral and written skills in French is considered a strong plus.

### Technical Proficiency:

- Demonstrates technical expertise and a strong commitment to client satisfaction, consistently delivering value that clients recognize and appreciate.
- Demonstrates strong information analysis and synthesis skills; structures data collected from clients in a manner that develops the firm's business intelligence.

### Client-Oriented Results:

- Exhibits a strong focus on meeting client needs, consistently achieving goals, and exceeding client expectations.
- Shows a dedication to surpassing performance objectives, effectively overcoming challenges, and proactively planning for contingencies to ensure seamless client service.

## **Working at Montrusco Bolton means that you will be able to**

- Contribute to the organized growth of a well-established Canadian company
- Have access to career development opportunities
- Enjoy a stimulating work environment in the heart of downtown Montreal, easily accessible by public transportation
- Currently offering a hybrid work model
- Have access to social benefits that promote work-family balance and personal development (group insurance plan, days off for wellness, financial support for sports/leisure activities and paid time off for learning)

Montrusco Bolton thanks all applicants for their interest in the firm; however, please note that no acknowledgment of receipt will be sent and that only selected candidates will be contacted.

Montrusco Bolton is committed to employment equity. Its policy is to select candidates based solely on their skills in order to choose the most qualified person for the position. Montrusco Bolton will select candidates regardless of age, gender, marital status, family status, sexual orientation, ethnicity, color, religion or physical disability.