Park Capital Management, a reputable and established Saskatchewan-based portfolio management firm (Family Office), is currently looking for a **Branch Manger** to join their team of financial professionals to support their growing client needs. The Firm provides discretionary investment management, nationwide, for private clients, corporations, estates, foundations, and professional financial service providers.

The **Branch Manager** will work directly with existing clients, attract new clients, and solicit our exclusive product offering and portfolio management services.

The Branch Manager will work from our head office in Regina, SK.

Responsibilities:

- Adherence to and full knowledge of the Firm's investment philosophies, strategies, and investment guidelines
- Lead team meetings, planning and training initiatives; share information and ideas with the team that contribute to the success of the organization
- Understanding clients' personal financial circumstances to design, implement, and monitor ongoing investment strategies within customized portfolios
- Managing client portfolios as per the Investment Policy Statement framework and rebalancing on a regular basis
- Providing investment reviews and effective communication of portfolio positioning to clients
- Providing recommendations, explanations and advice to existing client inquiries
- Delivering highly personalized client service and demonstrating a thorough understanding of client needs and situations
- Marketing the firm to prospective new clients
- Providing recommendations and designing individualized investment proposals
- Supporting the research of various investment subject matters, economic sectors, and company specific selections,
- Participate in various projects, committees, and assignments as required

Qualifications:

Candidates Must meet regulatory and licensing requirements (PM, EMD) to be considered for an Advising Representative role.

- CFA, CIM, or discretionary portfolio manager designation or MBA
- CFP or industry related secondary education is considered an asset, but not mandatory
- A minimum of 5 years relevant investment management experience (to meet registration requirements)
- Experience in research and thorough understanding of portfolio analysis
- Education, experience or aptitude in marketing and sales is considered an asset
- Provincial registration as an Advising Representative or Investment Advisor

The successful Candidate is expected to learn and become knowledgeable about the Firm's product offerings and compliance regulations and requirements. You must have the ability to effectively assess investor suitability in this context, and document fulsome notes with respect to all prospective and client contact.

If you are looking for a chance to work with a portfolio management firm where talent and initiative are recognized and rewarded, we would really like to speak to you. Please email a resume to luke@parkcapitalmanagement.com or call 306-206-1780.