Park Capital Management, a reputable and established Saskatchewan-based portfolio management firm (Family Office), is currently looking for a licensed **Dealing Representative – Exempt Market Dealer (Wholesaler)** 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 **Dealing Representative** will work to solicit our exclusive Exempt Market Product offering.

The Dealing Representative will preferably work from our head office in Regina, SK. We will consider qualified candidates to work remotely. On site location is required for initial orientation and regular on-going job requirements.

Responsibilities:

- Adherence to and full knowledge of the Firm's investment philosophies, strategies, and investment guidelines
- Understanding clients' personal financial circumstances to design, implement, and monitor ongoing investment strategies within customized portfolios
- Experience with high net worth clients and professional financial service providers
- Providing recommendations and explanations of EMD Products
- 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
- Autonomy to build and run your own business, in a flexible environment

Qualifications:

Candidates Must meet regulatory and licensing requirements (EMD) to be considered for a Dealing Representative role.

- University Degree (Finance, Accounting, Economics, or Mathematics, or related specialization is considered an asset)
- Canadian Securities Course (CSC) and/or Exempt Market Products Course (EMP)
- CFA, CIM, CFP or industry related secondary education is considered an asset, but not mandatory
- Experience in research and thorough understanding of portfolio analysis
- Education, experience or aptitude in marketing and sales is considered an asset
- You have 4-6 years of outbound sales experience and are comfortable earning 100% commission
- You are self-motivated, have integrity and empathy, and a commitment to a career as an Investment Advisor
- You recognize the value of hard work and investment of time to build a successful business
- You have excellent communications skills
- Ability to work independently and as part of a team

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.