

## JOB POSTING

### Associate, Client Service Manager

#### Who We Are

[Foyston, Gordon & Payne Inc.](#) (FGP) is an investment management firm founded by three entrepreneurs in 1980 and now employs over 45 people, managing approximately \$8 billion in assets on behalf of institutional and private clients. Our portfolio managers look for quality and value in Canadian bonds, Canadian equities, and Global equities, while our hiring managers look for dynamic and highly skilled people to join our organization.

#### Job Description

We are looking for an Associate, Client Service Manager to join our team to provide exceptional service to our Institutional, Sub-Advisory, and High-Net Worth clients. The Associate will work in a collaborative client service team reporting to the Manager, Client Services.

#### Primary responsibilities include:

- Responding to client inquiries accurately and efficiently
- Completing client reporting on a monthly, quarterly, annually, and ad hoc basis
- Preparing presentations for client and consultant meetings
- Processing client trades and cash flow activity
- Maintaining detailed working knowledge of client Investment Policy Statements and Investment Management Agreements
- Maintaining accurate client records in Satuit (CRM)
- Implementing the Client Account Opening Process for new client accounts

#### Skills/Attributes:

- Ability to complete assigned tasks/presentations in a timely manner and to prioritize multiple tasks
- Exceptional verbal and written communication skills
- Strong attention to detail leading to high level of accuracy in all work
- Team player able to work with colleagues in Operations, Investments, Marketing, Business Development, and other departments.
- Excellent working knowledge of Microsoft Office products, especially PowerPoint, Word and Excel
- Previous experience in a client servicing or equivalent role in an investment management firm who is enthusiastic and can build strong client relationships
- Solid working knowledge of equity and fixed income products for investment management industry
- Investigative/inquiring nature with good problem-solving skills and able to work with minimal supervision

#### Education and Experience:

- Post secondary education with a university degree or college.
- Canadian Securities Course (CSC) or Investment Funds in Canada (IFC) course
- A least 3 years of client servicing experience in an investment management firm

#### Salary Range

- \$65,000 to \$75,000 per year

This full-time, hybrid position represents a current vacancy within our organization.

We are committed to providing equal opportunities for persons with disabilities. Accommodations are available at all stages of the recruitment process, at the candidate's request.

Please note that your application and any related materials you provide may be processed, stored, reviewed, or otherwise used by systems in our recruitment selection process that may interact with artificial intelligence (AI) tools. This includes any AI integrated functions that may be used by the job board through which you applied to our position.

Please send your resume to [btan@foyston.com](mailto:btan@foyston.com). Only those candidates who meet our requirements will be contacted.