Vice President, Portfolio Manager - Calgary

Imagine work and life co-existing.

Imagine a company that actually believes its employees are the future?

Imagine a global company with over 10,000 employees that have names not numbers.

Imagine working for a company that offered you a flexible rewards and benefits package that can actually be tailored to your needs (not to the company's!).

Stop *imagining* things and start living the change. We are currently looking for a **VP, Portfolio Manager** to work in our Calgary office.

Overall Accountability:

The unique combination of Investment Counseling, Investment Management and Personal Trust expertise offered by Fiduciary Trust Company of Canada, a subsidiary of Franklin Templeton Investments Corp. combined with the global scale and expertise of the asset management firms that comprise Franklin Templeton Investments sets us apart from our competitors in our ability to deliver highly customized wealth management solutions to third party advisors and their clients.

The Investment Counsel team within Fiduciary Trust Company of Canada is responsible for the delivery of private client investment counseling services. Your role within the team will be to manage a book of discretionary private client relationships consistent with Fiduciary Trust Company of Canada's (FTCC) investment outlook and strategy.

In time there may be opportunity to participate directly in the investment decision making process commensurate with interest and market experience. In the meantime, you will contribute experience, knowledge, and expertise in portfolio management to ensure that each client's financial needs, risk tolerance, and long term objectives are thoroughly understood. Drawing upon your existing track record of success, there is opportunity to define your chosen business development niche: trusts & foundations, centre of influence referrals or investment advisor referrals. You will develop customized proposals designed to best achieve your client's objectives and will develop Personal Trust referral opportunities from within your client base to better serve your client's unique wealth management needs.

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INVESTMENTS

Your responsibilities include:

Relationship Management

- Manage a private client discretionary book of business.
- Conduct regular client review meetings and provide adhoc investment updates as required
- Conduct formal annual IPS reviews

Business Development

- Work with the FTCC Private Wealth Counsellor(s) as required to close qualified discretionary investment management business.
- Develop a network of referring centres of influence and client prospects to present discretionary solutions.
- Support FTCC Managed Solutions presentations

Investment Analysis

- Member FTCC Investment Communications Committee

General

- Overall team contribution and project support

As the qualified candidate you possess:

CFA designation or equivalent.
Prior experience managing HNW clients in a servicing/sales capacity
Strong relationship building skills
Demonstrated sales success in the high net worth or private client market
Related work experience or course work in the Personal Trust field
Strong verbal and written communication skills
Proficiency with word processing, spreadsheet and presentation software
Ability to Travel is required

Please contact us at: Careers@FranklinTempleton.ca for more information on this position.

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