

October 2018



Consultant

Opportunity:

We are currently seeking a Consultant to join our team. In this role, the successful candidate will be responsible for supporting all aspects of Prime Quadrant's relationships with a select group of affluent families.

Prime Quadrant:

Prime Quadrant is an investment research and consulting firm that assists affluent families in reaching their long-term goals through careful stewardship of their wealth. Employing a rigorous investment model, our team of research analysts identifies global best-in-class investment opportunities for our clients across all asset classes.

With nearly \$4.5 billion of assets under advisement, our Consulting teams work diligently with each family to optimize their investment portfolios by incorporating best investment practices and an appropriate mix of investment opportunities.

With a client-focused business model, progressive culture and collaborative team environment, Prime Quadrant's growth is accelerating. Your contribution to this growth will be both important and valued as an important member of the firm's consulting team.

Responsibilities Include:

Investment Advice

- Supporting the Senior Consultant by providing advice to Prime Quadrant clients including Investment Policy Statement (IPS) creation, asset allocation, investment manager selection, liquidity and currency management, portfolio construction and all other related matters.
- Facilitating clients' understanding of Prime Quadrant's investment research and opportunities.
- Overseeing accurate execution of all client portfolio reporting.
- Collaborating with clients' service providers (e.g. accountants, lawyers, etc.) to ensure a seamless client experience.

Client Relationships

- Attending monthly meetings with clients, including managing meeting preparation and post-meeting deliverables.
- Managing client requests as directed by the Senior Consultant.
- Engaging with clients on a regular basis to ensure their expectations are constantly being exceeded.

Continuous Improvement

- Suggesting improvements to Prime Quadrant's firm-wide procedures and processes.
- Continuously learning and upgrading skills.

Prime Quadrant is committed to fair and accessible employment practices and we are committed to providing accommodations for persons with disabilities. If you require accommodations in order to apply for any job opportunities, or require this posting in an additional format, please contact us at careers@primequadrant.com or call 647 749-4118. If you are contacted by Prime Quadrant regarding a job opportunity or testing and require accommodation in any stage of the recruitment process, please use the above contact information. We will work with all applicants to determine appropriate accommodation for individual accessibility needs.

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Key attributes:

- Excellent team orientation.
- Ability to prioritize, multi-task and work in a fast-paced environment.
- Willingness to learn and improve.
- Work independently and proactively with minimal management supervision.
- Continuously willing to go above-and-beyond in order to provide a first-class client experience.

Qualifications:

- 3+ years experience providing investment advice and client relationship management.
- Registerable under the firm's PM registration as an Associate Advising Representative and under the firm's EMD registration as a Dealing Representative.
- Excellent verbal and written English communication skills.
- CFP / TEP designation a benefit.

Compensation & Benefits:

- Industry competitive salary with a performance-based bonus structure.
- Health benefits via participation in the firm's health spending account.
- Financial support for continued education.

Applicants should submit their resume and cover letter to careers@primequadrant.com

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