

October 2018



Senior Consultant

Opportunity:

We are currently seeking a Senior Consultant to join our team. In this role, the successful candidate will be responsible for leading 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 Senior Consultants 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 a member of the firm's leadership group.

Responsibilities Include:

Investment Advice

- 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

- Leading monthly meetings with clients, including overseeing all meeting preparation and post-meeting deliverables.
- Managing client requests.
- Engaging with clients on a regular basis to ensure their expectations are constantly being exceeded.

Managing People

- Responsible for timely and accurate completion of your consulting team's deliverables.
- Leading your consulting team with guidance, mentorship and advice for improvement.
- Conducting regular performance reviews of team members.

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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Continuous Improvement

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

Key attributes:

- Demonstrated ability to lead and manage a Private Client service team.
- 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 an exceptional client experience.

Qualifications:

- 10+ years experience providing investment advice and client relationship management.
- Registerable under the firm's PM registration as an 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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