PENDER
PenderFund Capital Management Ltd.

Job Posting

PenderFund Capital Management Ltd ("Pender") is an independent, employee-owned, value-based investment firm founded in 2003. We are one of the fastest growing investment firms in Canada, and our goal is to be the first choice for investors looking to protect and grow their capital. We've grown from a couple of investing misfits into a diverse and inclusive workplace of 50 people by seeking out and hiring the most qualified, talented and experienced people.

We are seeking an **Associate, Institutional Sales & Service**, based in our Vancouver head office, who will work with the Director of Institutional and Family Office Wealth Services. The successful candidate will have a passion for relationship management as well as an entrepreneurial drive to identify, develop and strengthen relationships with a diverse clientele of sophisticated investors and prospects, including Family Offices, Foundations, Endowments and Pensions. This is an excellent opportunity for someone in the early stages of their career interested in a rewarding career path to becoming a successful relationship manager for high net worth individuals, family offices and institutions.

Main Responsibilities include:

- Play a key role in the sales cycle through client/consultant prospecting, responding to RFPs/RFIs, assisting with client due diligence and onboarding.
- Own and optimize the CRM system by gathering data relevant to client and prospect contact details, recording meeting notes, tracking follow ups and keeping the momentum within the sales process.
- Develop strong working relationships internally and externally to understand needs and coordinate responses.
- Contribute to client engagement activities; prepare client reports and investment presentations, coordinate the distribution of monthly newsletters and other communications to clients and prospects: assist with the coordination of events, including webinars and virtual conferences.
- Contribute to the continuous improvement of client onboarding; harness new technology to improve processes and increase efficiency and quality.
- Maintain key third-party databases focused on the institutional market by gathering information from multiple departments and resources.
- Maintain a comprehensive understanding of Pender's Funds and industry trends in the institutional and family office market.

Qualifications:

- A post secondary education
- CFA or working toward designation preferred
- Prior experience in the financial services industry is preferred.
- Excellent verbal and written communication skills
- Superior client service skills.
- Excellent problem solving and analytical skills
- Ability to work independently and to be a great team player

What's in it for you?

- Competitive salary, bonus and benefits package.
- Opportunity to be part of a talented, collaborative and growing team
- Potential for career advancement

Commitment to Diversity: We have found that being diverse and inclusive simply makes us better. Not all of us have backgrounds in financial services and this is one of the best ways in which we are diverse – we bring a range of knowledge and experience to every scenario. We do not discriminate on any basis and welcome applications from all qualified individuals. When selecting candidates for employment, promotion, training or any other benefits, it is on the basis of aptitude and ability. Should you require any accommodation or have questions, please let us know.

Candidates can apply by emailing a resume and a cover letter to careers@penderfund.com. We will be accepting applications as long as this posting appears on the Pender website.