



Capstone Asset Management is a Portfolio Manager, Investment Fund Manager and Exempt Market Dealer active in British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Quebec, Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland and Labrador.

Striving to hold to Biblically informed values, we provide full discretionary investment management and individual investment mandates to high net worth individuals and families, institutions, pensions, foundations, and family offices. We are a boutique firm with over \$800 million in assets under management.

*Title:* Assistant to Portfolio Manager  
*Reporting to:* Janet Kim Sing  
*Department:* Private Wealth Team  
*Location:* In person at our offices in Langley, BC

*Summary of Position:*

Capstone Asset Management seeks an Assistant to Portfolio Manager who will provide administrative support to an advising Portfolio Manager while working closely with other team members. The successful applicant will be a self-starter, organized, and a team player who aligns with our philosophical values. This is a 40 hour per week, in-office opportunity.

*Duties & Responsibilities:*

- Schedule client meetings using Calendly
- Respond to client's inquiries via email and telephone
- Manage client information using CRM software
- Ensure client paperwork is up to date and compliant
- Set up and prepare for client review meetings including boardroom setup and cleanup
- Assist in client paperwork and processing related to investment accounts
- General administration & reception duties
- Produce a variety of reports and statements as requested
- Draft correspondence to clients
- Coordinate travel arrangements as required
- Assist in collation and distribution of reports
- Complete miscellaneous tasks & projects as required



*Qualifications & Experience:*

- Proficiency in MS Office including Word, Excel and Outlook
- Strong written and verbal communication skills
- Pleasant telephone manner
- Ability to multi-task while remaining organized
- Strong attention to detail
- Minimum of 2 years administrative experience preferably with a financial institution
- Ability to learn various software resources for report generation and other tasks
- Knowledge of investment account types such as RRSPs, RESPs and TFSAs, and Locked-in accounts preferred
- Familiarity with industry and service provider software/systems such as Infinite Harmony, SGGG Diamond, NBIN NetRep and iMost preferred
- Canadian Securities Course or similar investment education preferred
- Experience in a Fund Management, IIROC, MFDA or CSA regulated environment preferred

*Required Competencies:*

- Business Acumen
- Information Gathering & Processing
- Information Management
- Planning & Organization
- Policy & Procedure Knowledge
- Project Management

Please forward your resume and cover letter in confidence to: [careers@capstoneassets.ca](mailto:careers@capstoneassets.ca)

Capstone Asset Management thanks you for your interest; however, only candidates selected for an interview will be contacted.

