

Associate Portfolio Manager

Full-Time | Permanent | In Office

Who We Are

Alitis is an Island-based, employee-owned discretionary portfolio management firm providing endowment-style portfolio management and comprehensive wealth planning services. Our team operates with an entrepreneurial, client-focused, and team-based spirit. Client testimonials and excellent retention rates reflect the enduring relationships that are a hallmark of the Alitis brand. With offices in Campbell River, Comox, and Victoria, we take a holistic approach to wealth management, supported by experienced Portfolio Managers, Financial Planners, and Insurance Specialists.

The Opportunity

Alitis Investment Counsel is actively seeking a dedicated team member to join our waterfront office in beautiful Campbell River.

The Associate Portfolio Manager will focus on effectively serving and managing smaller client relationships. This role emphasizes streamlined portfolio management, regulatory compliance, and consistent quality client communication while leveraging technology to deliver scalable customer service. Acting as a trusted first point of contact for clients, the Associate Portfolio Manager ensures clients receive responsive, high-quality support and will coordinate with senior portfolio managers as client needs evolve. This position is ideal for a professional who excels in managing relationships at scale and thrives in a collaborative, client-focused environment.

Responsibilities

- Deliver consistent, high-quality service to Alitis' smaller client segment, ensuring efficiency and adherence to client service standards.
- Manage client portfolios with Alitis pools emphasizing efficiency, alignment with client goals, and high-quality implementation.
- Ensure compliance with all regulatory requirements, including Know Your Client (KYC) and Know Your Products (KYP) obligations.

- Maintain regular communication with clients, providing timely updates and responding promptly to inquiries.
- Support business development by identifying opportunities to expand relationships within the assigned client segment.
- Collaborate with Senior Portfolio Managers to transition growing client relationships in line with Alitis' standards.
- Utilize technology and standardized processes to enhance efficiency and scalability of service delivery.
- Contribute to team initiatives and support the overall growth of the Alitis brand.
- Actively participate in business development activities on a regular basis, including preparing presentations, attending community events, etc.

Experience and Qualifications

- 3–5 years of experience in client-facing financial services or investment management roles.
- Chartered Investment Manager (CIM)
- Eligible to be registered as an Associate Advising Representative under BC securities regulations.
- Strong organizational skills and the ability to manage several client relationships efficiently and effectively.
- Experience with Microsoft Office Suite is required. Salesforce or CRM proficiency will be considered an asset.
- Insurance licensing for life, sickness, and accident products will be considered an asset.

Key Competencies

- Client-focused with strong interpersonal and communication skills.
- Highly organized and adept at managing multiple priorities with efficiency.
- Team-oriented and collaborative, with a commitment to upholding Alitis' service standards.
- Technologically savvy and comfortable working with digital tools to streamline processes.
- Professional integrity and a proactive approach to building client trust.

Compensation and Benefits

- Annual salary of \$100,000 – \$120,000 commensurate with experience.
- Four (4) weeks' vacation plus flex days and additional time off for holiday office closure.
- Quarterly commissions earned on new assets brought to the firm.
- Employer-funded group RRSP.
- Comprehensive group benefits program.

How to Apply

Sound like a fit? Send your resume with your name + *Associate Portfolio Manager* in the subject line to **careers@reimaginework.ca**.

Alitis is an equal opportunity employer. We are committed to creating a diverse environment. All applicants will receive consideration for employment without regard to race, colour, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, or age.

We thank all candidates for their applications; however, only shortlisted candidates will be contacted.

Please note that we are unable to provide any sponsorship or support work visas of any kind at this time. Applicants must be able to work in Canada for any employer in a full-time, permanent capacity without sponsorship.