ASSOCIATE – OPERATIONS & PROJECT MANAGEMENT

PRIVATE CLIENT INVESTMENT SERVICES

Hillsdale Investment Management Inc. (Hillsdale) is an independent, employee-driven, and client-aligned investment boutique managing assets on behalf of a select group of sophisticated institutional and private wealth investors. We engage in disciplined active investment management, specializing in equities, alternatives, ESG, and customized mandates. We are committed to producing the highest quality equity investment strategies. As a firm, we value curiosity, humility and resilience, and we strive to maintain an open, collegial and dynamic work environment. Hillsdale is recognized for both investment and service excellence – a reflection of our relentless pursuit of research and development and the dedication of our employees who invest alongside our clients.

Hillsdale has been recognized as a **Great Place to Work** both in our industry and across Canada.

Do you excel at operations, project management and streamlining processes, and are you looking to widen your experience by joining a growing team?

We are looking for an operations professional who takes ownership, anticipates what comes next and connects information across clients, processes and systems.

WHAT'S THE OPPORTUNITY?

At Hillsdale, we take pride in delivering a high-touch, high-integrity experience to every client we serve. In this role, you will join our Private Client Investment Services (PCIS) team to support high-net-worth clients and improve the processes and systems behind their experience. This is an opportunity to work in a team-oriented environment where accuracy, curiosity, and initiative are valued — and where your contributions make a tangible impact every day. Key responsibilities include:

- **Operations:** Execute, manage and improve recurring operational activities, including account opening, trade entry, trade confirmations, transaction requests, and documentation. Map current workflows to develop operating manuals, standard operating procedures, checklists and training materials.
- **Project Management and Process Improvement:** Lead and coordinate operational improvement projects from planning through implementation. Identify gaps and inefficiencies to streamline and standardize processes. Track priorities, timelines, dependencies and follow-up items while collaborating with PCIS, the Office of the Chief Operating Officer (COO) and other internal stakeholders.
- **Technology and AI-enabled Process Improvement:** Learn and apply new technologies, especially AI-enabled tools, to find information, solve problems, automate routine work and improve processes. Test new approaches resourcefully and use sound judgment to validate results.
- **Data Management and Integration:** Extract, validate and reconcile data across Hillsdale and third-party systems. Connect business needs with system capabilities to improve reporting, automate workflows and support integrations.
- **Customer Service Support:** Coordinate information and follow-up across internal and external parties, resolve issues and ensure service requests move forward accurately and efficiently. Maintain ownership through resolution and keep relevant parties informed of progress.

WHAT WILL YOU BRING?

- A minimum of four years of operations and project management experience.
- Advanced Microsoft Excel skills, backed by strong hands-on experience using Excel for data analysis and reporting, along with proficiency in Word and PowerPoint and evidence of curiosity and experimentation in the use of AI tools.
- A logical, process-oriented mindset with the ability to document and analyze information-intensive workflows, identify root causes and convert findings into practical improvements and actionable insights.
- Strong organizational and project management skills, with the ability to manage multiple workstreams, documents, deadlines and details accurately and drive outcomes; create and maintain process manuals and standard operating procedures; and follow initiatives through to completion.
- A Bachelor's degree in finance, business or a related field of study.

Good to Have:

- Working knowledge of or exposure to SQL and VBA to support data extraction, reconciliation, reporting, workflow automation and integration with Hillsdale systems. Experience translating business requirements into repeatable technical or process solutions is an asset.
- Familiarity with financial markets and a thorough understanding of mutual and pooled funds.
- Experience working with third-party service providers (e.g., NBIN), wealth management software (e.g., Croesus, Naviplan), CRM solutions and the aptitude to quickly learn other technology platforms (e.g., Docusign, Constant Contact).
- Enrollment in or completion of CSC.

WHAT'S IN IT FOR YOU?

- The estimated pay range for this position is CAD $80,000-$120,000. Actual compensation may vary based on several factors, including bonus eligibility, relevant experience, skills, education/training and location. The upper end of the range is typically reserved for candidates who demonstrate expertise exceeding the position's requirements.
- Competitive performance bonus, paid vacation time, extended health care and a generous Health Care Spending Account.
- Supportive amenities: commuting reimbursement, access to a stocked kitchen, catered lunches, and monthly employee events.
- Hillsdale's charitable giving program matches your donations and supports your volunteer interests.
- Access to an in-house personal Financial Advisor.
- Centrally located office at King and Bay, and remarkable views of Toronto and Lake Ontario when you work from the office. We offer a flexible working environment.

Application Deadline: November 30, 2026.

Additional Information

This job advertisement is a current vacancy for a new opportunity. Hillsdale may use artificial intelligence (AI) tools to assist in screening and assessing applicants. The use of AI does not replace human decision making.

Hillsdale is an equal opportunity employer and as such does not discriminate on the basis of race, colour, religion, sex, national origins, age, sexual orientation, disability or any other characteristic protected by applicable laws. We encourage applications from people of all abilities and will make reasonable accommodations upon request.

Not sure if you qualify? Apply anyway! Our workforce comes from diverse backgrounds and industries. Please forward a cover letter and resume to careers@hillsdaleinv.com.

We thank all interested applicants; however, only those selected for an interview and legally eligible to work in Canada will be contacted.