

INVESTMENT COUNSELLOR / PRIVATE CLIENT INVESTMENT SERVICES

Hillsdale Investment Management Inc. (Hillsdale) is an **independent, employee-controlled, and client-aligned** investment boutique managing **more than \$10 billion** on behalf of a select group of sophisticated institutional and private wealth investors. We are renowned for designing systematic, bespoke investment strategies across diverse objectives, including over 15 investment strategies focusing on high alpha, ESG, customized, and smart beta. We are committed to producing the highest quality equity investment strategies and delivering client service excellence. Hillsdale is recognized for 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** for the past three years in our industry and across Canada.

ABOUT THE ROLE

Hillsdale is expanding with an exciting opportunity to join our Private Client Investment Services as an **Investment Counsellor (IC)** reporting to the Head of Private Client Investment Services. The successful candidate will be vital to Hillsdale's continued and profitable growth plans.

Do you excel at managing and building lasting client relationships? If so, join us and work directly with an independent investment manager, gaining access to **cutting-edge research** and investment expertise. At Hillsdale, we provide **a full range of investment solutions, financial planning services and wealth advice** to high-net-worth clients on a **discretionary basis**. We act as fiduciaries for our clients, conducting in-depth reviews of their unique investment goals and risk tolerance to develop and deliver highly personalized investment strategies.

WHAT WILL YOU DO?

- Manage existing client base of high-net-worth individuals, professionals, families and business owners with financial net worth of \$1 million and above.
- Act as a fiduciary and foster trusted, often multi-generational, long-term relationships using personalized service and advice.
- Provide clients with access to Hillsdale's investment strategies and customized wealth management and investment services.
- Conduct comprehensive client discovery and planning (KYC) to define and execute appropriate investment policy.
- Regular communication with clients to review investment performance, goals and asset mix, providing recommendations for adjustments.
- Support the Head of Private Clients with on-going sales, service and communication with clients and prospects.
- Play an essential role in contributing to sales collateral and thought leadership.
- Adherence to the compliance framework by consistently following internal policies and external regulatory procedures.

WHAT WILL YOU BRING?

This career opportunity requires proven investment management, sales and service capabilities. We welcome passionate, open-minded individuals with diverse academic backgrounds, work experiences, perspectives, thinking styles, and expertise to apply to this position. Your qualifications include:

- 4-10 years of experience within the investment industry, with at least 2 years of portfolio management or investment management experience.
- Preference for a registered Advising Representative (AR) or Client Relationship Manager (CRM). Candidates registered as an Associate Advising Representative (AAR) will also be considered, provided they have the required education and relevant experience to become registered as an AR or CRM.
- Chartered Financial Analyst (CFA) or Chartered Investment Manager (CIM) designation.
- Certified Financial Planner (CFP) is good to have.
- Bachelor's degree in Finance, Business, Economics or another related field.
- Demonstrated success in nurturing and building relationships.
- Strong knowledge of economic trends, financial markets and investment products and services.
- An aptitude for dealing with people positively and enthusiastically.
- Strong knowledge of Excel and experience with Microsoft Office Suite.

WHAT'S IN IT FOR YOU?

- Base Salary (**\$125,000-\$175,000**) as a component of a generous compensation structure that may include discretionary bonuses, and recurring trailers and commissions. Actual compensation will 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.
- **Access to tools to ensure your success**, such as institutional-grade global investment solutions encompassing **more than 25 countries and more than ten currencies**, a team of **in-house Portfolio Managers** and **advanced investment research**.
- A **purpose-built product line** with proven track record in line with the needs of high-net-worth individuals.
- Professional Development, ongoing mentorship and growth opportunities/defined career pathing.
- Employee appreciation services include a kitchen stocked with food, catered lunches, gym membership, ergonomic home office setup, monthly employee appreciation events, and annual retreats.
- Charitable giving program and support for your volunteer interests.
- Health Care Spending Account.
- Flexible work environment and commuting reimbursement when you do work in the office.
- Centrally located office at King and Bay with remarkable views of Toronto and Lake Ontario.

Application Deadline: Applications will be accepted until the position is filled.

Additional Information

This job advertisement is for an existing vacancy. 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 provide 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. Hillsdale posts job ads for existing vacancies only.

We thank all interested applicants; however, only those selected for an interview and legally eligible to work in Canada will be contacted. Hillsdale uses AI to screen, assess and select applicants in accordance with applicable laws.