

Westmount Wealth Management Inc. – Senior Investment Analyst, Vancouver, BC

Westmount Wealth Management Inc. is a Vancouver-based Portfolio Manager, managing over \$350mm of discretionary client assets and acting as the advisor to two pooled funds focused on alternative assets. At Westmount, we believe that our clients deserve the best and so does our team.

What Makes Us Different

People:

If you've never settled for good enough, you'll be in good company here. Every member of our team is driven, informed, and exceptional at what they do. We work together to deliver all aspects of wealth management seamlessly.

We focus on creating a fun work environment with a generous compensation package (fully paid health benefits, health spending account, generous holidays) and a flexible work schedule.

Technology:

We have paired up with industry leading technology platforms to streamline the administration and the ways we connect with our clients.

Positioning:

We combine high level pension-style portfolio management with personalized financial planning to successful individuals seeking unbiased advice. We are passionate about our business, our culture, and are looking to attract, retain and develop individuals who have the same drive.

Must have requirements to be successful in this role:

- Chartered Financial Analyst (CFA) designation and Chartered Alternative Investment Analyst (CAIA) designation are highly desired.
- 5+ years of direct work experience in investment management or consulting with a focus on portfolio analysis in multi-asset investment strategies, including public and private markets.
- Professional exposure to private assets is a must.
- Strong quantitative and analytical skills, with experience in risk modeling and statistical analysis. Programming experience in Python, R, or other statistical computing language is considered an advantage.
- Registration with provincial securities commissions as an Advising Representative, or the ability to become registered is desired.
- The successful candidate will ideally have experience at an endowment, foundation, pension fund, or consultant where they had a role in sourcing investment opportunities, relationship building, quantitative and qualitative due diligence, while working in a team environment.
- They will have a keen understanding of investment markets, strategies, structuring, and experience in portfolio construction and an understanding of the Total Portfolio Approach.

What You'll Do:

We are seeking an experienced investor to join our investment team and play a leadership role in the evolution of Westmount Wealth's investment models and pooled funds. The successful candidate will report to the CIO and will be responsible for assisting in the portfolio construction process, including sourcing, diligencing, and managing investment opportunities across asset classes in private and public markets.

You will assist with establishing portfolio-level risk and return goals for our investment strategies and identifying specific factor exposures to drive performance and achieve our investment objectives. You will monitor asset valuations to identify investment opportunities and risks, with a focus on private assets.

You bring experience in the investment due diligence and operational due diligence processes across public and private markets. You will support the CIO and CCO with Westmount's "Know Your Product" responsibilities and lead our IDD and ODD processes.

Location:

- While Westmount Wealth is based in Vancouver, we will consider a remote opportunity for the ideal candidate.

Compensation:

- Annual base salary of \$140,000 - \$170,000 dependent on experience and qualifications.
- Bonus potential based on firm profitability and individual performance.
- Comprehensive health benefits, including a Health Spending Account.

Resumes can be sent to t.hawkins@westmountwealth.com