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OPPORTUNITY PROFILE VICE PRESIDENT (CALGARY AND EDMONTON)

Connor
Clark & Lunn
Private Capital





CONNOR, CLARK & LUNN PRIVATE CAPITAL | VICE PRESIDENT

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THE ORGANIZATION

VICE PRESIDENT

CC&L is looking for at least one Vice President in its Calgary and Edmonton office.

Connor, Clark & Lunn Financial Group Ltd. provides a broad range of traditional and alternative investment products and services to individuals, advisors and institutional investors. With roots dating back to 1982, the firm has grown to become one of Canada's largest privately owned asset management firms. Our affiliate teams collectively manage almost \$90 billion in assets from offices located across Canada and in Chicago and London. They are structured in a "multi-boutique" model with the belief that smaller tightly focused operating units are the most effective means of attracting high quality individuals and establishing a suitable long-term alignment of interests.

Connor, Clark & Lunn Private Capital is an affiliate of the Connor, Clark & Lunn Financial Group, founded over twenty years ago with a vision to provide private clients access to the same discipline and talent afforded to institutional pension clients. Today, CC&L Private Capital offers professional discretionary money management services to Canadian individuals, families, Indigenous communities, not-for-profits and charitable foundations. The firm is currently trusted to steward almost \$12 billion in client wealth.

To learn more, please visit www.cclprivatecapital.com

Connor, Clark and Lunn Private Capital has a significant opportunity to capture new business in the direct high net worth market, as well as through partnerships with the advisor community.

High level job accountabilities include:

- Building a portfolio of new clients through strategic, guided, and proven business development activities.
- Maintaining client relationships throughout varying market and performance conditions by providing clients with proactive and exceptional service.
- Establishing immediate credibility with successful, sophisticated high net worth clients
- Building and maintaining relationships with lawyers, accountants, and other centres-of-influence, including financial advisors who will enable you to continue to build your business.



THE PERSON

The ideal candidate will be a successful sales and business builder interested in using their existing network to establish their own business at CC&L. A background in investments and financial services that may include, financial product wholesaling, high net worth business development, or investment advising and counselling. Success in this role requires building trusting long term financial relationships with high net worth individuals.



Specific Knowledge, Skills, Abilities & Required Qualifications:

The ideal candidate will possess the following qualifications and experience:

- An aptitude for strategic sales, business development, combined with an entrepreneurial spirit
- Excellent interpersonal skills and a high level of integrity
- Great communicator with excellent presentation abilities
- Several years of related experience in sales and business development in financial services or investments
- A CFA level 1 and/or CIM certification are required credentials
- An undergraduate degree and CFA designation would be an asset



Competencies and Personal Characteristics

Leadership - Achieves desired organizational results by encouraging and supporting the contribution of others; a proactive and positive team player who acts with a sense of urgency and leads by example; sets and communicates clear goals.

Accountable – Holds self and others accountable for responsibilities; focuses on results and measuring attainment of outcomes in a business focus.

Strategic – Develops and implements a plan in support of organizational strategic direction. Demonstrates an understanding of the link between one's job responsibilities and overall organizational goals and needs, and performs one's job with the broader goals in mind.

Integrity and Honesty – Demonstrates a resolute commitment to the spirit and intent behind the rules and core values of the organization, setting an example of professionalism and ethical propriety.

Creativity and Innovation – Accepts change and works alongside the vision of the firm to approach the role with a sense of creativity and desire for innovation. A natural curiosity for people supports proactive activities to deliver value for clients and connect with prospects.

Effective Working Relationships – Treats staff, colleagues, and customers with respect; resolves conflicts respectfully and in a timely manner, negotiates effectively, and provides effective feedback to colleagues/employees.

Influential and Collaborative – Has an honest, open, and consistent approach to working with others and possesses strong relationship and interpersonal skills, with the ability to build relationships and develop/maintain partnerships, obtaining stakeholder agreement.

Communication – Clearly presents written and verbal information; writes with clarity and purpose; communicates effectively in both positive and negative circumstances; listens well.

People Development – Takes personal responsibility for continued learning and development and is supportive of the development of others. Willingly participates in coaching conversations and acts as a mentor with a desire to support others and help them succeed; formally and informally recognizes deserving staff/colleagues.

Customer Focused – Anticipates, responds, and attends to the needs of colleagues and other internal and external stakeholders of the department and organization; keeps customer interests in the forefront.



COMPENSATION

A base salary will be provided for two years and then the compensation will become entirely commission-based with unlimited upside potential and an opportunity for equity ownership.

Further details will be discussed in a personal interview.

FOR INFORMATION PLEASE CONTACT:

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