

# Leaders

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## **OPPORTUNITY PROFILE**

### **Vice President Operations**



## About Northfront Financial

<https://northfront.com/>

### Who We Are

Our client, Northfront Financial, helps create financial capacity for their clients by deeply understanding their needs, opportunities and strengths through their unique Northfront Process™. Their mission is to work with their team and partners to provide a world class wealth management experience through an in-depth understanding of their clients' objectives.

They work with individuals and families to address their financial lives in their entirety, by providing financial planning, tax planning, investment management, insurance, and estate planning services. They pride themselves on being one of Calgary's leading wealth management teams with highly skilled, certified team members. The goals of their clients are paramount, and they are the focus of their practice.

Northfront has moved beyond the traditional investment approaches by considering all aspects of their client's financial picture and examining how they work together to reduce tax and increase investment returns. Combining the client's complete financial picture with their pension-style investing approach, they work to achieve their short, medium, and long-term financial goals. Using pooled funds, Northfront gives clients access to alternative investments beyond traditional stocks and bonds. Many individual investors and their advisors may not be set up to take advantage of these opportunities – at Northfront Financial, they are.

**Vision** We help create financial capacity for our clients so they can have the impact they want on their family and community.

**Mission** Work with our team and partners to provide a world-class advisory, investing and planning experience through a unique understanding of our clients' objectives.

**“What is important to you, is important to us.”**



## The Role: Vice President Operations

**Ask yourself:** Is this the right role for you? Are you ready to join a proven organization, poised for continued growth and expansion? Do you have the desire, ability, and talent to work closely with the partnership group to take Northfront to the next level?

**If so:** You will be able to demonstrate a history and proven track record of leadership, innovation, personal and team success. You have a reputation as a strong leader of people, able to attract, develop, motivate, and mentor a team, while promoting a culture that aligns with the greater organization. Your capability to communicate effectively is a given, demonstrated through clear and concise language and thought, both spoken and written. You are able to facilitate and contribute to the ongoing corporate strategic planning process, providing input, and bringing consensus among the partners defining the future direction and goals of the company.

Reporting to the ownership of the firm through the Managing Partner, the Vice President Operations is a contributing member of the senior leadership team and is responsible for the efficient, effective, and integrated operation of Northfront Financial. The Vice President is responsible to lead a team of third party providers as well as part-time and full-time employees in the areas Finance and Accounting, Portfolio Management, Portfolio Administration, Compliance, Business Development, Insurance, Information Technology, Human Resources and Client Service.

This role is both strategic and tactical. As such, you are equally comfortable in the trenches rolling up your sleeves with your skilled team, as you are strategizing with the Partners.

## Key Responsibilities

### Business Affairs

- Develops the processes and systems to ensure the execution of approved goals, objectives, business plans, budgets and policies of the firm.
- Oversee the internal financials and controls of the firm, including elements such as cash flow management, banking arrangements, and other finance and accounting items.



- Provides appropriate and timely information and statistics to the partners to keep them informed of business operations, business issues and major risks facing the firm.
- Ensures effective assignment and allocation of resources (financial, human and physical) to achieve the stated goals and objectives of the firm.
- Provides effective oversight and efficient delivery of the Administration/Human Resources, real estate management, and IT Services. Includes management of team member delivery and/or 3<sup>rd</sup> party provider delivery of these services.
- Provides support for a variety of special projects and initiatives at the direction of the partners. The nature and scope of the initiatives will vary considerably depending on the firm's needs and will often be identified and proposed by the partners in consultation with staff in other parts of the firm.
- Liaise with suppliers and other service providers to ensure best practices and attractive commercial terms.

### **Leadership**

- Responsible for developing and sustaining a high-performing team of employees; development of a human resource practices and support systems, fostering an organizational culture and work climate that attracts and retains high caliber personnel.
- Works collaboratively with the partners and associated committees in support of their governance duties and obligations. This includes regulatory support as required.

### **Business Operations**

- Will be cross trained on multiple trading platforms and networks as required to ensure safe operating redundancies in the organization.
- Will support the partners and team in day-to-day client facing needs and operations as required.





## The Person

- University degree in Business Administration, Commerce, Human Resources, or another relevant field. An MBA would be considered an asset.
- Understanding of financial services and investment management not required but would be an asset.
- Five years management or supervisory experience or an impressive combination of experience and designations.
- Proven track record of success as a manager and leader.
- Strong project management skills.
- Strong communication and relationship skills. Demonstrated oral, written and listening communication skills.
- Team player, coach, mentor, continuous improvement bias with vision on better methods and processes
- Proven ability to work collaboratively across all areas of an organization and at all levels, from line staff to senior executive team and Partners.
- Strong organization skills. Sense of urgency and deadline focused.
- Strong analytical and problem-solving skills.

## Express Your Enthusiasm

Please email a convincing cover letter and tailored resume (PDF or Word document only) to **Allan Nelson** or **Chelsey Howarth** at [calgary@leadersinternational.com](mailto:calgary@leadersinternational.com) indicating the job title in the subject line of the email.

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