

BMO Harris Private Banking is a leader in providing integrated private banking services in Canada. Our focus goes beyond traditional wealth management to meet our clients' individual needs. We are all about integrated solutions, not products. As a result of our focused approach, we have won **Euromoney** magazine's "**Best Canadian Private Bank**" award for the last 3 years!

The investment management services available at BMO Harris Private Banking are specifically geared to meet the needs of high net worth Canadians. As members of the Bank of Montreal Group of Companies, we have a solid understanding of the issues that face Canadian investors. We are committed to providing our clients with original ideas to preserve their wealth throughout life, tax effective strategies for transferring their assets and creative solutions for providing support to the people who matter the most to them. As well, our partnership with Chicago based Harris Private Bank makes us the only Canadian bank to offer an integrated, seamless North American delivery of customized investment management solutions. Harris has been managing money since 1882 – four years before the Dow Jones Industrial Average was established.

We are currently seeking to add an Associate Director and Investment Counselor to our **Edmonton** team. This person would be responsible for developing our highly successful business in Edmonton and surrounding area and to be part of the highly successful team contributing to the delivery of innovative ideas and service to our diverse high net worth clientele. **This position would be ideal for a person currently working as an Associate, who is looking to manage and grow a significant portfolio of business!**

As a member of our team based in the **Edmonton BMO Harris Private Banking** office, you will work closely with your Investment Counseling teammates and with your peers in the other disciplines, to maximize the client relationship experience across all appropriate product lines and services. You will contribute experience, knowledge and expertise in portfolio and relationship management ensuring that each client's financial needs, risk tolerances and investment objectives are thoroughly understood. You will focus on client satisfaction and retention and growth of your portfolio by consolidating investment assets from current clients and by increasing the number and profitability of clients.

You must be a very strong, energetic and confident relationship builder, because you will be working with your teammates and partners to ensure that our clients receive the best possible financial solutions through a seamless, fully integrated offering. You must be committed to teamwork and be willing to cooperate within and beyond your work group. You must show good judgment, be willing to take initiative, be entrepreneurial and be achievement orientated. You must also be able to develop a solid working rapport with professionals within BMO Harris Private Banking, the Bank of Montreal and key referral sources outside of the Bank of Montreal Group of Companies, in order to better understand their roles and expertise.

**You must be a Chartered Financial Analyst charter holder** and must also be capable of being registered as a Senior IC/PM in Alberta. You must also have three or more years of investment industry sales experience and an excellent knowledge of pertinent investment management, tax issues, trust and fiduciary laws. A demonstrated ability to develop business and to spot referral opportunities would be a definite asset.

Please forward any questions or applications with cover letters and resumes to the contact below, by Nov 16th, 2007.

Robert Oleksyn, CFA

 BMO  Harris Private Banking

VP & Regional Director | Investment Management

5th Floor | 10199 - 101 Street | Edmonton | AB | T5J 3Y4

☎ 780.408.0513 | 📠 780.906.3748 | 📠 780.408.0520

**BEST CANADIAN PRIVATE BANK – 2007**

*Euromoney Magazine Global Survey*

[robert.oleksyn@bmo.com](mailto:robert.oleksyn@bmo.com)