

**Portfolio Manager
Edmonton, Alberta
Permanent Full-Time**

Welcome to the land of opportunity. ATB Financial is the largest Alberta-based financial institution servicing over 600,000 Albertans in 245 communities. With rapid growth and new branches opening throughout the province, the career opportunities for new and seasoned professionals are endless!

We hire the best. We are looking for talented individuals who have a genuine desire to help others, enjoy problem solving, demonstrate initiative and take pride in keeping promises and commitments. If this sounds like you, then you will thrive with us!

Share in the success. ATB Financial rewards performance through a combination of salary and incentive pay programs. We also offer an industry-leading reward and recognition program that celebrates individual, team, company and community achievements.

ATB Financial was recently acknowledged by *Benefits Canada* as having one of **Canada's Top 30 Benefit and Pension Plans**.

Apply today and see why ATB Financial is truly a great place to work.

An exciting opportunity has recently become available for a Portfolio Manager in our Investor Services department.

Reporting to the Vice President, Wealth Management, you will be responsible for building and maintaining a portfolio of strong, long term, profitable client relationships by providing superior investment management services to ATB Financial's highest customer segment by assets (generally defined as high net worth individual, corporate and institutional clients with over \$2 million in investable assets). The Portfolio Manager is responsible for partnering with the retail and independent business branch network to build relationships with existing high net worth clients while developing new business opportunities. This involves identifying investment objectives and implementing an appropriate investment program, customized where necessary to meet the specific needs of high-end clients. A secondary focus will be assisting ATB Investor Services Financial Advisors in customizing investment portfolios for clients serviced by them.

Your key responsibilities will include:

- Develops wealth management business for high-end clients based upon current or prospective ATB clients' needs, objectives, and service requirements within the territory assigned.
- Actively manages a portfolio of client relationships.
- Establishes strong working relationship with internal customers including Regional Vice-Presidents, Branch Managers, Independent Business and Corporate and Retail staff.
- Assists client with identifying their investment objectives and designs and implements investment programs to meet their particular investment needs.
- Achieves sales objectives established.
- Ensures compliance requirements are met.
- Promotes and develops knowledge of wealth management services through the retail and IB networks and local community in order to encourage appropriate client referrals.
- Tracks business development activities and provides timely reporting, documentation, and submission of business development activities and business expenses.
- Adheres at all times to ATB wealth management policies concerning "know your client" and other relevant policies and procedures.

As the ideal candidate you possess:

- Minimum of seven years of related investment industry experience, including relationship management and portfolio construction for high net worth investors.
- Proven track record of successfully building wealth management relationships with clients.
- Strong customer service skills commensurate with the expectations of high-end clients.
- Ability to analyze existing portfolios and customize new portfolios where appropriate.
- Broad knowledge of a wide range of investment products.
- Communication and interpersonal competencies
- University Degree or equivalent related experience
- Chartered Financial Analyst designation

Please note: You will be asked to complete an online questionnaire for this position. The process should take approximately 20 minutes.

Close date: October 23, 2007

All applications are held in strict confidence. ATB Financial is an equal opportunity employer who encourages applications from all qualified applicants. We thank all applicants for their interest; however, only short listed candidates will be contacted.

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