



E D G E P O I N T®

## JOB OPPORTUNITY

### **We're looking for a...**

Trade operations associate

### **Who the heck are we?**

EdgePoint Wealth Management is a Toronto-based investment firm. We're long-term investors in businesses and believe that the best way to buy a business at an attractive price is to have an idea about the business not widely shared by others. We're not afraid to look different from the crowd. In fact, we believe in order to outperform in the long run, you have to be willing to look wrong in the short term. We focus on companies with strong competitive positions, defensible barriers to entry and long-term growth prospects that are run by competent management teams. We invest globally across the capital structure in both public and private securities. To learn more about us, please visit [www.edgepointwealth.com](http://www.edgepointwealth.com).

### **What's the job about?**

EdgePoint is a different kind of investment company seeking a highly organized and detail-oriented **trade operations associate** to join our Trade Operations team to support our overall trading function.

The trade operations associate's key responsibilities include monitoring daily trade settlements; identifying potential problems prior to trade settlements and working with custodians and brokers on settlement issues and reconciling cash and portfolio holdings; daily account maintenance; coordinating collateral movements; monitoring and reviewing corporate actions and ensuring timely responses to custodians; proxy voting administrative support; and managing account openings for different markets; and assist with operational projects and ad hoc requests as required from other internal teams.

### **What makes a good partner?**

At EdgePoint, we try to maintain a company culture that inspires our employees to think and act like owners. We believe employees with a stake in the success of a business are more motivated to meet (and exceed) the expectations of their individual role.

Besides that, we're looking for internal partners that also bring:

- A satisfaction guarantee – you're only happy when all issues are resolved
- Foresight – be on the ball and enjoy being one step ahead
- Flexibility and dependability – deadlines and changing situations mean being able to adapt quickly. You'll always need to be revved up and ready to get things done
- Team skills – enjoy working collaboratively with other people
- Attention to detail – if you've got an eagle eye, we want to hear from you
- Desire to learn – there will be many opportunities to grow and adapt
- Trade operations experience – relevant experience of working in a trade support environment. Understanding of how an investment management firm operates and interaction with administrators, custodians, broker settlement support teams; familiarity with equities, bonds, derivatives and cash management
- Experience working with trading platforms preferred but not required – Charles River system, CTM (DTCC global platform for central matching) and Bloomberg
- Organizational and communication skills – no matter how smart you are, staying on top of tasks and effectively sharing your ideas are key
- Strong computer proficiency – specifically a sound knowledge of MS Office suite
- Education – post secondary education with relevant experience



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### **So what's in it for me?**

Here are some of the benefits of working at EdgePoint:

- Compensation – annual bonus in addition to salary
  - Company equity ownership program
  - Company-funded RRSP contributions
  - Comprehensive Health and Dental coverage
  - On-site gym (and regular company lunches to fuel those workout sessions)
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### **Not just a boring resume**

To be considered for the role, please send us your resume and a response to the question below to [weAreGrowing@edgepointwealth.com](mailto:weAreGrowing@edgepointwealth.com):

*What value do you believe the trade operations function brings to an investment firm?*

The deadline for applications is **February 14, 2025**.

EdgePoint is an equal-opportunity workplace. We thank all applicants for their interest; however, only those candidates selected for an interview will be contacted.

EdgePoint is committed to fair and accessible employment practices. If selected for an interview, we will work with you to ensure that your interview is accessible and accommodation is provided. Please contact us at [info@edgepointwealth.com](mailto:info@edgepointwealth.com) or 416.963.9353 to let us know if you require accommodation for an interview due to a disability.