



TRADER

ABOUT OUR FIRM

Viewpoint Investment Partners Corporation is a technology-forward investment and wealth management firm that generates returns in a different fashion than the rest of the industry, with the aim to deliver superior outcomes for investors. The firm has built a quantitative system to add diversification to a portfolio without sacrificing returns or liquidity. This system allows the firm to harvest the structural diversification premium that is available in financial markets. Viewpoint Investment Partners is based in Calgary, Alberta and is owned and operated by Viewpoint Group, a team of trusted custodians who oversee the affairs of the investment management company, a private charitable foundation, and a single-family office. The firm is entirely independent, and family/employee owned.

Viewpoint Investment Partners is a fast-growing investment firm serving a wide range of clients including institutions, family offices, and high net worth investors. Our data-driven, rigorous research approach successfully drives value and allows the firm to turn diversification into excess returns. We aim to build wealth for our investors and contribute to the betterment of the industry through leading-edge research and positive action. We have an entrepreneurial culture and believe strongly in alignment with our investors. Our key organizational values are authenticity, curiosity, and intellectual humility.

OUR TEAM

Our research and investment process, the Quantitative Strategy Delivery Lifecycle, enables consistency and repeatability in the delivery and construction of our investment portfolios. A crucial pillar of the delivery lifecycle is the human execution of the rules-based strategy, ensuring consistent delivery of model results in real time. As a member of the investment operations team, you will collaborate with a tight knit group of investment professionals and portfolio managers to ensure the successful execution of Viewpoint's investment strategies. The successful applicant will be a key member of the investment operations team and will have a direct impact on the success of the firm.

CORE RESPONSIBILITIES

- Trade execution of ETFs, bonds, derivatives (forwards and futures), foreign exchange.
- Trade allocation, matching and settlement throughout global financial markets.
- Reconciliation of order management and portfolio management systems.
- Cash management of pooled funds and separately managed accounts.
- Confirmation of trading activity with fund administrator.
- Monthly reporting as required, including CSA credit reconciliation.
- Work closely with compliance to compile trading oversight data and any relevant regulatory filings.

REQUIRED QUALIFICATIONS

- Valid post-secondary degree.
- Experience in trading and knowledge of market structure.
- Experience in the investment industry in a middle and/or back office role.
- Strong knowledge of trade matching and settlement functions.
- Previous experience with cash management for various counterparties including prime brokerage, DVP/RVP, and futures clearing desks.
- Securities knowledge (including equities, fixed income, derivatives, and FX).
- Strong interest in portfolio management and finance.

The following would be considered assets:

- CFA Charterholder, or enrolled in CFA program.
- Completion of Canadian Securities Course, or other CSI courses.

HOW WE DESCRIBE OURSELVES

- We seek to actively embrace an entrepreneurial mindset.
- We believe great problem solving takes time and multiple iterations.
- We are self-starters who share a high level of trust with each other.
- Our passion for financial markets is rivalled only by our passion for working with incredible people.
- We hold each other accountable to staying curious and intellectually humble.
- We require a high level of ethical standards from ourselves and our partners.

OTHER DETAILS

- Compensation package will reflect candidate's experience and skillset.
- We regularly engage in professional development/learning and embrace a culture with feedback and accountability.

Please submit your resume with a brief cover letter to Paula Sexsmith
via email at psexsmith@viewpointgroup.ca
