SEARCH PROFILE

University of Toronto Asset Management
Investment Associate, Fixed Income

Chris Heselton
Vice President, Executive Search
Office: 647.788.3205
Email: cheselton@optimumtalent.com

Ryna Young
Vice President, Executive Search
Office: 647.788.3235
Email: ryoung@optimumtalent.com
THE ORGANIZATION

Our Client, the University of Toronto Asset Management (“UTAM”) is the investment manager for the University of Toronto’s Pension, Endowment and short-term working capital assets. UTAM manages over $10 billion in assets with a team of more than 20 professionals. UTAM invests globally across a variety of asset classes using a wide range of strategies. Their sole focus is to invest university assets. Please refer to https://utam.utoronto.ca/ for more information about them.

THE OPPORTUNITY

Job Title: Investment Associate, Fixed Income
Reports to: Head of Fixed Income
Location: Toronto, ON

MANDATE

Due to growth of the investment team, UTAM has created a new role and is looking to add an Investment Associate, Fixed Income, reporting to the Head of Fixed Income. The Associate will conduct research and analysis to help identify, evaluate and manage fixed income investments globally, including private credit investments, fixed income-focused hedge funds, public fixed income investments and cash investments. While focused on fixed income strategies, the Associate will also participate in regular internal investment team meetings and gain exposure to all asset classes. This is a great opportunity to join a collaborative and high performing team with an exceptional leader at the helm.

KEY ACCOUNTABILITIES

- Help manage the pipeline of fixed income investment opportunities, schedule and attend meetings/calls with existing and potential investment managers, take meeting notes, and update and maintain UTAM’s investment management research database.
- Support and implement various aspects of the investment process, including conducting analysis and due diligence on potential investments/managers and assisting in the closing and portfolio reporting processes for completed investments.
- Participate in the portfolio management and monitoring of UTAM’s fixed income investment portfolio, including portfolio analysis, investment pacing, performance analytics, and completion of reviews of existing investments.
- Assist in developing, writing and presenting detailed investment recommendation memos.
- Conduct strategy research and analysis on various fixed income strategy segments.
- Undertake domestic and international travel as required.
- Performance of other duties and ad-hoc projects as required.
CANDIDATE PROFILE & QUALIFICATIONS

- A minimum of a Bachelor’s Degree is required, with a strong academic record; an undergraduate or graduate degree in a finance-related or a quantitative discipline is preferred.
- Three or more years of investment management or related work experience.
- Progress towards, or completion of, the CFA designation is considered an asset.
- Strong written and oral communication skills.
- Sound judgment, very close attention to detail.
- Ability to work in a fast-paced environment and manage multiple initiatives or projects concurrently.
- Well-developed quantitative analytical skills. High proficiency expected in Word, Excel and PowerPoint.
- Interest and ability to work in a collegial and small-team environment.

COMPENSATION

Competitive compensation package in the form of salary, annual bonus, vacation allowance, and support in completing CFA designation (financial and paid study leave). In addition, UTAM offers a comprehensive benefits package, including a defined-benefit pension plan.

APPLICATIONS

To apply, please send your resume in Word or PDF format to Angus McComb at amccomb@optimumtalent.com

Copy and Paste the following job title and code and place it in the subject line of your email so we can identify the job and confirm receipt of your application:

A019112 (ALOD-265606) Investment Associate, Fixed Income - Toronto (OTIAPPLY)