Job Title Equity Research Account Manager

Hiring Manager Anthony Scilipoti, Chief Executive Officer
Dan Fong, Head of Research

About Veritas Twenty-four years ago, Veritas Investment Research flipped the equity research model on its head - instead of giving away research and making money through banking relationships, we used our independence to produce high-quality research that we could sell to clients. That model still stands today, with Veritas having grown to become Canada's largest independent equity research firm. Veritas is best known for our bold calls, such as our warning on Valeant before it collapsed 90%, and advising to sell cannabis stocks throughout the entire IPO mania. However, we wouldn't consider ourselves pessimists so much as pragmatists - our research BUY recommendations have outperformed the S&P/TSX index by a 3.5% CAGR while our SELLS have underperformed by 4.9%. Being independent gives us the power to say things that others can't or won't.

Our mission is to be the #1 source of trusted, independent research that helps investors make better investment decisions.

Job Type Full-time

Job Description As the Equity Research Account Manager, you will be integral in the growth of the company. Your focus will be geared towards increasing mindshare with our existing client base, as well as establishing new connections with family offices, and institutional and retail clients to drive revenue growth.

Key Responsibilities

- Increase research team interactions and mindshare with high value clients
- Prospecting and relationship building with defined family offices, institutional investors and retail clients globally
- Convert prospects, leads, and other high value interactions into revenues
- Learn and understand changes in client needs and interests, and report findings to the CEO and Head of Research
- Work with the CEO and Head of Research to develop the product offering and execute an effectively targeted sales strategy
- Coordinate and prepare materials for client and prospect meetings
- Generate a continuous cycle of sales and marketing initiatives, such as analyst seminars, training webinars, and promotional events
- Attend industry and intermediary events to grow presence in the marketplace
- Prepare for and book branch presentations, and advisor and prospect meetings
- Produce illustrations and product proposals
- Organize and execute marketing campaigns based on email and open rates from clients and prospects
- Create sales reports and report all observations to the CEO and Head of Research
- Tackle service issues for all existing clients and provide feedback that may help to develop and market the overall business
- Make sales and strategy recommendations to the CEO and Head of Research based on independent analysis and assessment of strategic issues

- Achieve sales objectives by executing on the strategic initiatives developed by management
- Maintain client records in the company's CRM (i.e. Outbound, Inbound Calls, as well as Meetings and Events)
- Adhere to all compliance, regulatory, confidentiality and legal policies and procedures

Academic Qualifications

- Post-secondary degree in a related field of study or an equivalent combination of education and experience
- Accounting designation or experience is an asset
- Canadian Securities Course (CSC) is an asset
- Demonstrates an advanced knowledge of investment research products and broker payment methods
- Advanced understanding of the advisory channels: IIROC, MFDA, etc.
- Strong interpersonal, communication and relationship management skills
- Strong problem-solving skills and analytical skills; ability to initiate investigation of problems without supervision and develops solutions
- Ability to balance multiple priorities while maintaining a high degree of accuracy and attention to detail
- Demonstrates tact and professionalism
- Proficiency with Bloomberg and/or FactSet is an asset

Years of Experience

Minimum five years in the investment research industry with previous transactional sales experience in financial information, SaaS and/or technology and a demonstrated track record of success

Target Market

- Financial Services
- Asset Management
- Family Offices
- Private Equity
- Pension Funds
- Hedge Funds
- Insurance Companies
- Wealth Management

Contact Information

Veritas Investment Research Corp.
100 Wellington Street West
TD West Tower, Suite 3110, PO Box 80
Toronto, Ontario
M5K 1E7

Please send cover letter and resume to careers@veritascorp.com
Only candidates selected for an interview will be contacted