



Opportunity Profile

Senior Analyst, Trust Performance & Compliance

Peace Hills Trust

Edmonton – Trust Office

February 7, 2024

Company

Peace Hills Trust is Canada's largest and oldest First Nations owned federally regulated financial institution and is also Canada's only independent Trust Company. Employing over 100 people, Peace Hills Trust provides personal and business financial services through a network of 9 Regional Offices and electronic services.

Peace Hills Trust is wholly owned by the Samson Cree Nation of Maskwacis, Alberta. Its Corporate Office is located in Edmonton, Alberta.

Trust Services

Trust Services is one of the leaders in Canada in First Nation Trusts. Peace Hills Trust, as a First Nation owned organization, is dedicated to the successful administration of First Nation Trusts and has been doing so for over 43 years.

Trust Services deals exclusively with First Nation Trusts, providing Customized Trust Services, and offers exceptional client service based on the principles of honesty, integrity, and transparency.

The Opportunity

We are looking for a CFA or a first level CFA candidate to act as a back office analyst in respect to compliance and investment performance monitoring of approximately 107 accounts and 14 external institutional investment managers. This position requires the incumbent to analyze investment manager's reports, maintain multiple data bases on various aspects of the manager's portfolios, including performance, asset mix, compliance with the client's investment policy statements and benchmark comparison. This information forms the basis for reports for internal and external use that are critical to the function of the department and client reporting.

In conjunction and support of the internal CFA the incumbent will be involved in issuing RFPs for investment manager services and perform detailed analysis of the responses in regard to specific requirements.

The Trust department has clients throughout Canada which result in multiple in person meetings with clients from BC to Quebec. The incumbent may be required to attend a select number of meetings.

The role will provide an opportunity to gain valuable insight into Trust Services processes, mentor under a senior CFA, build stronger relationships and ultimately establish your reputation as a company that provides excellent customer support with potential leading into future growth and career opportunities within the company.

Accountabilities include:

- Receives investment manager reports and inputs performance data against benchmarks, inputs, and generates various Mercer reports and assists the CFA with quarterly and annual reports.
- Reviews quarterly reports to ensure compliance with the Investment Policy Statement.
- Prepares in conjunction with the CFA Investment Policy Statements, RFP's, quarterly and annual reports.
- Works to control data through a CRM and client virtual library.

The Ideal Candidate

The Senior Analyst position is a perfect step towards a career within the trust and investment world and is ideally suited for an individual with experience as an analyst or investment professional.

Selected candidates will work in a stimulating progressive environment that moves quickly and effectively in servicing a well-focused market, along with a competitive salary and a full range of benefits.

Qualifications:

- University degree and a CFA or CFA candidate.
- 3 to 5 years as an analyst or investment industry experience.
- Prepared to complete the CFA designation.
- Knowledge of asset management and administration procedures is an asset.

If you are highly motivated individual looking for a challenge, we invite you to forward a detailed resume and brief letter outlining income expectations and how the position applied for fits into your career goals to:

Peace Hills Trust Company
Corporate Office
Phone: 780.421.1606
Email: georgina.villeneuve@peacehills.com

We appreciate the interest of all applicants however only those selected for consideration will be contacted.

Deadline Date: Until Position is Filled