



Chief Investment Officer

Company Name: W. A. Robinson & Associates Ltd.

Direct Report: CEO Wayne Robinson, BA (Sc), RFP, CIM, CFA.

Position Statement

W. A. Robinson & Associates Ltd. is a family-owned business offering Portfolio Management and Investment Fund Management services in Ontario, Quebec and the Western provinces. Its president has founded two mortgage investment corporations (MICs) with assets of \$65 million. The family also owns and operates a mortgage brokerage firm, Pillar Financial Services Inc. (Pillar). It is Pillar's responsibility to invest the pooled funds of the MICs in mortgages on properties in Eastern and Central Ontario. Assets under management are growing at a rate of approximately 20% per year. The companies are expecting strong growth and we are looking for an entrepreneurial, analytical individual to join the executive team.

The Chief Investment Officer (CIO) will be part of the new executive team responsible for supporting the portfolio manager and overseeing the investments of the MICs and private portfolio clients. The CIO will provide input to the long-term direction of the group of companies. The CIO will also ensure compliance requirements of the OSC and FSCO are met for the investment functions of the organization. W. A. Robinson & Associates Ltd. is located in Sharbot Lake, Ontario, an hour north of Kingston and just over an hour west of Ottawa. Sharbot Lake is a fully serviced waterfront community in the Land O' Lakes district.

Position Scope

In this role you will own the day-to-day responsibilities for the investment side of portfolio management, including, but not limited to:

- Provide input to the corporate direction for the development of portfolio management
- Provide input to Investment Policy Statements and Portfolio Risk Management policies
- Assist in the development of customized investment strategies, proposals and action plans for existing and potential clients, including mortgage investments
- Ensure client funds (including mortgage investment corporations – MICs) are invested to the levels required to earn targeted returns
- Identify processing requirements and solutions for approved investment strategies
- Ensure all documentation and actions taken meet W.A. Robinson & Associates Ltd.'s policies and procedures and external regulatory compliance requirements
- Ensure compliance reporting for the CIO functional areas is performed as required by law
- Identify staffing requirements to meet the account officer, underwriting and business development areas of accountability
- Manage staff in terms of mentoring, communicating and contributing to a high level of morale
- Participate in community and centre of influence events

- Maintain an expert level of knowledge of the securities market, mortgage industry, estate planning and the Income Tax Act
- Maintain an expert level of knowledge of applicable legislation and compliance issues
- Acquire and maintain expert level of knowledge of the organization's policies and procedures

Requirements

Expertise

- Ability to manage a client's personal and family dynamics
- Strong analytical skills
- Passion for deal making
- Organizational awareness
- Ability to assist with business development and sales
- Excellent verbal and written communication skills (bilingual an asset)
- Ability to communicate with clients about economic conditions and general investment, estate, financial, trust and taxation issues
- Strong interpersonal skills

Education

- University Degree (preferably in Business and/or Economics)
- CFA or equivalent

Experience

- A minimum of 2 years as a registered salesperson; or
- 2+ years as an Investment Advisor or Analyst performing research involving financial analysis of investments
- Minimum 5+ years of investment industry experience
- Accounting with mortgage industry experience preferred
- Management experience at the senior level

Position Type

Permanent; Full-time.

Location

Sharbot Lake, Ontario.

W. A. Robinson & Associates is at an exciting crossroads. An aggressive marketing strategy has been approved and the implementation of corporate restructuring to accommodate growth is underway. Join our team to build your own career and help determine the future of the group of companies. We will provide a community and accommodation package to interviewed candidates. Visit our website at www.RobinsonsGroup.com. To be considered for this position, please submit your resume to resume@robinsonsgroup.com by March 1, 2010.