

EQUITY RESEARCH ANALYST

ABOUT OUR FIRM

Since our beginning in June of 1999, CWB McLean & Partners has put clients at the heart of everything we do. We focus more on our client's success than that of the firm's, and our approach to serving our clients beyond being "just a number on a spreadsheet" remains unchanged. CWB McLean & Partners has a team of 25 dedicated professionals and manages over \$1.3 billion in assets.

CWB McLean & Partners operates under the private wealth arm of CWB Wealth Management. As part of CWB Wealth Management, we draw on each other's breadth of experience, knowledge, and support to deliver the best solutions for our clients. CWB Wealth Management's majority ownership gives us strength in operations, and allows us to broaden our financial service offerings. We are also sub-advisors of the CWB Onyx Mutual Funds.

OUR CORES

In order to successfully execute on our vision of becoming the wealth management company of choice, we seek individuals whose values are aligned with the core character of our company (CORES):

CONTINUOUSLY IMPROVE

We commit to constant learning to perpetually improve ourselves, our processes, and the results we deliver. Our "never-stop-learning" approach includes embracing both successes and bumps in the road as learning experiences.

OWN IT

We operate with unmitigated transparency and honesty, we take personal responsibility and accountability for our commitments and actions.

REFUSE TO GIVE UP

We are disciplined and resilient in our approach.

EXCEL TOGETHER

We draw collaboratively on our collective strengths to operate as an effective team.

SEEK THE TRUTH

We strive to make insightful decisions, based on a thorough understanding of the facts.



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OUR RESEARCH TEAM AND YOUR ROLE

The team currently consists of five professionals – our Director of Research and four Research Analysts. We manage seven private pools and segregated portfolios using a bottom-up fundamental research process in accordance with our investment philosophy. We also work closely with the Private Client Team to assist in portfolio construction and asset allocation at the individual client level.

We are growing our team and looking to hire an Equity Research Analyst. We are looking for someone who shares the same passion, interest, and understanding of fundamentals-based long-term investing. The research analyst will be involved with the team on a daily basis in researching and following new and existing companies, discussing specific investment opportunities, and helping to manage the portfolios. Aside from the technical skills and responsibilities, we are interested in a candidate who is a “thinker” - someone who likes to read voraciously, learn continuously, and hold open discussions with their colleagues.

CRITICAL DUTIES AND RESPONSIBILITIES

- Research and monitor existing investments, and over time, uncover new investment opportunities.
- Maintain and prepare financial models to determine valuation of existing investments or potential opportunities. The candidate must therefore have significant financial modeling (e.g. DCF) experience.
- Perform bottom-up analysis to uncover business strategy, industry characteristics, and market expectations of existing investments or potential opportunities.
- Write research reports which clearly articulate the investment thesis and fundamental analysis of an investment opportunity.
- Perform administrative tasks, as may be required occasionally.

Reports to Ric Palombi, Director of Research

DESIRED SKILLS AND EXPERIENCE

- Minimum of 5 years of total work experience, of which at least 3 years must be in the buy and/or sell-side investment industry.
- Bachelor degree or higher, working towards CFA designation.



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- Must have significant financial modeling experience in MS Excel and be proficient in valuation methods based on well-established concepts and theories.
- Must have strong verbal and written communication skills in English.
- Independent thought process and creativity, developed through continuous learning and evolution.
- Committed to building a career in investment management with a strong belief in a fundamental-centric investment process.
- Ability to conduct strategic analysis of a business and its industry.
- Entrepreneurial mindset; exhibit preference for small but accountable team structure and the ability to take initiatives and find solutions.

APPLICATION

In an effort to get to know you and your passion for investing, we have taken the standard cover letter component out of the hiring process and are giving you an opportunity to really tell us something meaningful. Please reflect on the following and submit your response, along with your resume **by June 23, 2019** to humanresources@cwbmp.com.

If you were asked to pick one of the companies below to research, which company would you choose and why? Please explain the process or method you employed to make this decision. Your answer should reflect your investment philosophy, thought process, and any facts/information that you used.

1. MTY Food Group (TSX:MTY)
2. CI Financial Group (TSX:CIX)
3. Cineplex Inc (TSX:CGX)
4. Deere & Company (NYSE:DE)
5. Intel Corp (Nasdaq:INTC)
6. Northwest Company (TSX:NWC)

Note that we are not looking for a report on one of these companies, but the thought process behind why you chose that company for further research. Your answer should be up to one page, with sensible and reasonable formatting. Please limit your resume to 2 pages.



McLEAN &
PARTNERS
WEALTH MANAGEMENT

A circular graphic with a gold background and a dark blue border. The words 'JOB POSTING' are written in white, serif, all-caps font, centered within the circle. The background of the entire page features a collage of images: a hand holding a globe, a city skyline with a tower, and a construction site with cranes.

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COMPENSATION

We offer a competitive base salary and benefits plan, based on industry experience and the responsibilities of the position. We also offer a bonus program based on new assets closed and achievement of business development targets. There is potential for equity ownership over time to those who excel in our culture and help us achieve our vision.

We encourage interested applicants to explore CWB McLean & Partners online and to review our website at www.cwbmcleanpartners.com.