

Vice President, Private Equity - BMO Global Asset Management

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Company: Bank of Montreal

Location: Toronto

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CAN time type Full time posted on Posted 2 Days Ago job requisition id R230021092 Application

Deadline:

01/02/2024 Address:

100 King Street West Job Family Group:

Strategy & Change Job Description:

Reporting to the Head of BMO Global Asset Management Private Equity, the Vice President, Private Equity is a key member of the private equity team with a broad range of responsibilities that include sourcing, due diligence, deal execution, portfolio management and management reporting for existing and future private equity funds/programs managed on behalf of institutional and private wealth clients. The individual will partner with the Head of Private Equity to expand BMO's global presence in the private equity sector. The role requires an experienced individual that is inquisitive, conscientious and possesses the competencies and desire to grow the private equity business within a renowned, global, Canadian financial institution by being actively involved in all aspects of the business.

Investment Management

Participating in all stages of a transaction including initial deal-flow identification, due diligence, preparation of investment papers, review of legal documents, management of capital calls and distributions and quarterly reporting

Analyzing and reviewing financial and operating information relating to private equity fund

investments and co-investments

Performing comprehensive research and due diligence on new investment opportunities

Preparing and/or reviewing financial models

Assessing the strengths and risks of each proposed investment

Summarizing the investment thesis in an investment memorandum for presentation to an Investment Committee

Reviewing and negotiating legal agreements, including Limited Partnership Agreements and Subscription Agreements

Conducting benchmark analysis using external Private Equity data sources such as Preqin, PitchBook, Burgiss and/or Cambridge Associates

Preparing quarterly performance reports for a portfolio of fund investments and co-investments

Verifying portfolio data to ensure accuracy

Reviewing and analyzing quarterly NAV statements and completing Mark-to-Market adjustments for existing portfolio investments, if required

Monitoring cash flows (capital calls and distributions) for the managed funds and their underlying investments

Completing reporting requirements, developing reports, and providing ad-hoc reporting Relationship Management

Establishing effective business relationships within the Canadian, U.S., U.K., and Western European private equity industry

Collaborating with BMO partners that are also active in private equity industry

Liaising regularly between the various BMO Global Asset Management teams that support the business (e.g., product, distribution, legal, tax)

Maintaining strong relationships with investors

Business Development

Promoting both the private equity capabilities of BMO GAM and the business's global products to North American institutional and qualified, accredited, high net worth investors

Drafting offering memoranda and investor presentations

Collaborating with BMO GAM's Distribution team as well as BMO Private Wealth Management to identify and market to prospective investors

Collaborating with the BMO GAM Product team in the launch of new products

Risk Management & Compliance

Managing the portfolio within established risk framework

Monitoring activities to ensure ongoing compliance with risk appetite, framework, and policies

Ensuring that new proposed investments comply with Anti Money Laundering protocols

Collaborating with the BMO Legal and BMO Tax teams to effectively manage the risks to the investors and BMO

Authorities

Scope & Impact

As a key member of the Private Equity team, the successful candidate's responsibilities will include developing innovative solutions to provide target markets with access to the private equity asset class and growing the private equity portfolios. The successful candidate will be involved in all stages of the transaction process, including initial deal flow identification, due diligence, preparation of investment papers, review of legal documents, management of capital calls and distributions and regular quarterly reporting.

Cross Functional Relationships

The role will involve some client-facing activity and there is scope for the successful candidate to be involved in business development. There will be a need for regular liaison and contact with our internal partners. The candidate will have a high regard for risk management and compliance procedures.

Knowledge & Skills

Education and Qualifications

An undergraduate degree, preferably with a degree in business

CA or CFA qualification is an asset

MBA is an asset

Experience investing in the private equity sector (funds and co-investments) with at least 8 years' experience

Skills and Abilities

Strong financial skills and investment acumen

Proven ability to work with seasoned private equity professionals

An understanding of the value creation process in private equity

Deep analytical skills to assess the merits and risks of private equity investments

Ability to attentively review, assess, and provide detailed information daily on multiple projects in an organized and concise manner

Ability to negotiate and communicate fund and deal structures

Excellent verbal and written communication skills

Strong interpersonal skills used within a collaborative and demanding team environment

Capability to independently function as part of a small team through self-motivation

Role Details

There is scope for the role to expand as the team grows.

Based on the 43rd floor of First Canadian Place, the successful candidate will work in a Canadian hybrid work environment

The successful candidate will work as a member of a smaller team in GAM

Travel may be required

We're here to help

At BMO we are driven by a shared Purpose: Boldly Grow the Good in business and life.

It calls on us to create lasting, positive change for our customers, our communities and our people. By working together, innovating and pushing boundaries, we transform lives and businesses, and power economic growth around the world.

As a member of the BMO team you are valued, respected and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one – for yourself and our customers. We'll support you with the tools and resources you need to reach new milestones, as you help our customers reach theirs. From in-depth training and coaching, to manager support and network-building opportunities, we'll help you gain valuable experience, and broaden your skillset.

To find out more visit us at <https://jobs.bmo.com/ca/en>.

BMO is committed to an inclusive, equitable and accessible workplace. By learning from each other's differences, we gain strength through our people and our perspectives.

Accommodations are available on request for candidates taking part in all aspects of the selection process. To request accommodation, please contact your recruiter.

Note to Recruiters: BMO does not accept unsolicited resumes from any source other than directly from a candidate. Any unsolicited resumes sent to BMO, directly or indirectly, will be considered BMO property. BMO will not pay a fee for any placement resulting from the receipt of an unsolicited resume. A recruiting agency must first have a valid, written and fully executed agency agreement contract for service to submit resumes. About Us BMO is a leading bank driven by a single purpose: to Boldly Grow the Good in business and life. Everywhere we do business, we're focused on building, investing and transforming how we work to drive performance and continue growing the good.

Who we are

We're proud to be fueling growth and expanding possibilities for individuals, families and businesses. More than 12 million customers count on us for personal and commercial banking, wealth management and investment services. As the 8th largest bank in North America by assets, we provide personal and commercial banking, wealth management and investment services to more than 12 million customers. In Canada, the United States and across the globe, we'll continue to build, invest and transform to drive performance that serves the good that grows. #J-18808-Ljbfrr

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