



**Job Title** Equity Research Account Manager

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

**About Veritas** Twenty-five 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 5.1%. 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 (hybrid), with a minimum of 3 days per week in office.

**Job Description** We are seeking a highly motivated and detail-oriented **Equity Research Account Manager** to join our team. The role is focused on two overall responsibilities.

- Driving revenue growth from existing institutional client relationships.
- Ensuring the seamless delivery of equity research services to institutional clients.

**Key Responsibilities**

**Primary:  
Business Development**

- Identify growth opportunities within existing accounts and ensure increased client spend.
- Build and maintain long-term relationships to drive client satisfaction and loyalty.
- Understand client investment strategies and research needs to deliver tailored solutions.
- Regularly engage with clients to showcase research insights and new offerings.

**Other:  
Coordination & Delivery**

- Act as a liaison between the equity research team and clients to ensure seamless communication, alignment on priorities, and timely delivery of insights.
- Organize high-impact interactions, such as client meetings, conference calls, and special events featuring Veritas analysts or executives.
- Manage bespoke client requests, ensuring high-quality, tailored responses to meet their unique investment questions.

**Market Intelligence & Client Feedback:**

- Gather and analyze client feedback to refine research offerings and enhance service delivery.
- Partner with internal teams to identify gaps or opportunities in research products based on market demand.
- Monitor equity markets, sector trends, and client activities to provide actionable insights.

**Reporting & Performance Analysis**

- Maintain detailed reports on client interactions, account performance, and engagement metrics.
- Regularly present account updates and business development progress to leadership and other stakeholders.

**Qualifications**

- Bachelor's degree in finance, economics, accounting, or a related field.
- Proven interpersonal and communication skills, with the ability to build credibility with clients.
- Proactive problem solver with strong organizational and project management abilities.
- Track record of achieving revenue growth targets.
- Experience in account management in the financial services sector is an asset.
- Understanding of equity markets, investment strategies, and equity research workflows is an asset.
- Proficiency in financial databases and tools such as Bloomberg, FactSet, or similar platforms is an asset.

**Years of Experience** 2-3 years with transactional sales experience within the financial information, SaaS, or technology sectors and a demonstrated track record of success. We also welcome applicants from client service industries or with relationship management backgrounds.

**Target Markets**

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

**Contact Information**

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**Please send a cover letter and resume to [careers@veritascorp.com](mailto:careers@veritascorp.com)**

Only candidates selected for an interview will be contacted