

## Senior Associate/Portfolio Manager – Private Equity

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Metis Settlements Development Corporation (MSDC) is the first Metis Settlements-owned investment management corporation.

We are doing Big Things. Do you want to be part of an organization that balances strong financial decisions with values and integrity to achieve objectives in Indigenous economic reconciliation? Do you want to be a part of accelerating opportunities for Indigenous participation in Canada's economy to create generational wealth and prosperity? Are you intrapreneurial and innovative?

Then the MSDC is for you! As a key member of our small but nimble team, you will be pivotal in growing MSDC's investment portfolio, developing investment policies and processes to build a successful \$100 million asset portfolio AND standing up a \$100 million impact investment fund.

### **Job Information**

Title: Senior Associate/Portfolio Manager – Private Equity

Reports to: Chief Investment Officer

### **Metis Settlements Development Corporation Overview**

#### **Mission**

To pursue the advancement and prosperity of economic interests for the Métis Settlements of Alberta.

#### **Vision**

To bring economic prosperity and independence to the Métis Settlements of Alberta.

MSDC aims to support the Métis Settlements in Alberta by building strong mutually beneficial economic relationships, creating more opportunities for the settlements across the province. MSDC is focused on economic reconciliation and equity for the Métis people of Alberta who reside on Métis settlements. Covering 1.25M acres of land in northern Alberta, across eight settlements, with a total population of approximately 5,000 people, the Métis settlements are the only land-based Métis settlements in Canada.

MSDC is an impact investment management firm that will make strategic investments to build long term financial benefit for the Métis settlements as members of the Metis Settlements Limited Partnership using the principles outlined in our strategic plan. We focus on building an investment portfolio that is diverse and builds on key principles for generational economic prosperity, social good and environmental stewardship. MSDC is focused on three pillars of investment – business and real estate acquisition and equity participation, major project participation and investment fund creation. We are built on a foundation of Métis values, knowledge, and culture.

#### **Values**

**Honesty** - Telling the truth. Leading in reliability, trustworthiness, transparency, loyalty, and sincerity.

## Senior Associate/Portfolio Manager – Private Equity

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Living the Value - We do not know what we do not know and cannot understand another's experience as we have not walked in their shoes. We are vulnerable and open to learning. We lead with empathy and a deep desire to learn.

**Respect** - Respecting our fellow man and our diverse relationships through understanding, building trust, and creating mutual relationships.

Living the Value - We acknowledge the diverse relationships enhance our understanding and perspective, and we welcome various opinions, viewpoints, and positive debate.

**Integrity** - Demonstrating strong and sound moral and ethical principles; always doing the right thing.

Living the Value - Always doing the right thing, even when it is hard, is our DNA. Integrity, fairness, and accountability for our actions are core in all our decisions and relationships.

**Collaboration** - We are all working together as one family towards common goals and creating mutually beneficial relationships.

Living the Value - We lead when appropriate to build opportunities, we participate actively in partnerships, and we fulfil multiple roles and are adaptive to support the achievement of common goals.

### The Role

The Senior Associate/Portfolio Manager reports to the Chief Investment Officer (CIO) and will support the CIO by focusing on due diligence and portfolio monitoring for the Metis Settlements Development Corporation (MSDC), which acts as General Partner to the Metis Settlements Impact Fund (MSIF) and Metis Settlements Limited Partnership. This role is responsible for overseeing the due diligence and investment activities, and, where required, for creating and executing strategies that align with our mission, values, and investment objectives.

Key responsibilities may include developing approaches to ensure that MSIF is able to meet its commitments to a specific and impactful investment portfolio, fulfills its mandate to generate wealth for the Metis Settlements of Alberta and to identify and, where possible, mitigates investment risks. The Senior Associate/Portfolio Manager oversees, directs, and supports investment analysis and works in collaboration with the executive team in the development of the investment portfolio. MSDC is a growing organization with a goal to build a portfolio of \$100M of assets under management and managing a \$100M impact investment fund.

### Principal Accountabilities

#### Investment Analysis and Due Diligence

- Key member of the deal team throughout the entire process.
- Oversee the due diligence process for investments.
- Support the development of required policies and procedures to ensure a consistent and complete approach to due diligence for investments.
- Prepare investment memoranda and other documentation.

## Senior Associate/Portfolio Manager – Private Equity

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- Support the CIO in presenting investment opportunities to the Investment Committee for review and approval including, but not limited to:
  - o Investment structure
  - o Financial analysis and valuation
  - o Risk analysis
  - o Terms of investment
  - o Where required, analysis of security

### Portfolio Monitoring and Reporting

- Maintain relationships with management of portfolio companies via regular phone calls and on-site meetings as required.
- Develop and maintain ongoing reporting to monitor the financial and operating performance of portfolio companies.
- Monitor and report on portfolio level risk and performance.
- Support the CIO in preparing strategic, financial, and operating reports and presentations for key stakeholders, including investors and the board.

### **Qualifications**

- 7+ years of experience in investment in progressively senior roles. Previous experience in private equity, venture capital, investment banking or consulting considered an asset.
- A post-secondary degree required. CFA, MBA, CPA, or other similar designations would be considered an asset.
- Strong experience in portfolio management, financial modeling, investment valuation, and risk assessment.
- Previous experience in energy and energy transition, agriculture, or healthcare considered an asset.
- Experience in both equity and lending investments as well as structuring investments.
- Experience managing a diverse group of stakeholders.
- Primarily remote, with occasional travel to portfolio companies or stakeholder meetings as required.

### **Competency**

#### *Skills*

- Strong knowledge of return generation strategies
- Strong knowledge of all asset classes
- Strong knowledge of various investment products
- Excellent verbal and written communication
- Excellent leadership skills
- Ability to juggle multiple projects and tasks
- Ability to lead teams

## Senior Associate/Portfolio Manager – Private Equity

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- Financial acumen

### *Knowledge*

- Digital financial management systems
- Microsoft Office software suites
- CRM management and development
- Capital Markets, Equity Markets and Venture fundraising.
- Canadian Securities Regulations
- Equity, Diversity, and Inclusion actions

### *Behaviour*

- Diversity – has a passion for indigenous economic reconciliation actions with a commitment to true action and equal Indigenous participation in Canada’s economy.
- Listening and understanding – has a passion for learning and understanding Indigenous ways of learning and culture and applying those to how we do business.
- Ally – works to be an ally to Indigenous people as aligned with our core values.
- Intrapreneurship – Motivated by building and growth, puts a personal stake and investment in the company's success.
- Vision - Sees possibilities for a potential future state and paves a path of achievement.
- Openness to feedback and ideas – Displays a growth mindset; seeks out and welcomes feedback.
- Honest and candid – Speaks plainly and truthfully, with ability to have 'courageous conversations'.

At MSDC we are focused on building a diverse team of passionate individuals who can build on experience. Even if you do not feel like you have the experience or skill set for this position, if you too are enthusiastic about our goals, we encourage you to reach out and chat with us; we prioritize innovation and development. At MSDC, we live and breathe our values and believe that if you do not ask, you do not know, and if you do not try, you will not succeed. We are enthusiastic about building a company that is rooted in Metis traditions, values, and culture. Connect with me today at [info@msdcorp.ca](mailto:info@msdcorp.ca) to chat about the role. Submit resumes and cover letters to [info@msdcorp.ca](mailto:info@msdcorp.ca) and tell me your “why” – what would being part of MSDC mean to you?

This is a virtual, remote position which can work from anywhere in Canada. Some travel may be required. Compensation will be structured on experience, and this role may be offered as either full-time employment or contract position. The final title (Senior Associate or Portfolio Manager) will be determined based on the candidate’s experience and expertise.

Deadline for Applications: January 31, 2025, 5pm. Apply at [careers@msdcorp.ca](mailto:careers@msdcorp.ca).