

Senior Analyst, Investments

Toronto, ON

Brookfield Annuity Company (“Brookfield Annuity”) is a life insurance company with a primary focus on the pension risk transfer market in which buy-out and buy-in group annuity policies are sold to defined benefit pension plans in Canada. With annual Canadian pension risk transfer volumes being over \$7B and growing, we are the only Canadian life insurance company that is primarily focused on providing group annuity solutions to defined benefit pension plans and to associations that facilitate retirement savings arrangements for their members.

For more information about Brookfield Annuity, visit our website at www.brookfieldannuity.com.

Brookfield Annuity is wholly owned by **Brookfield Wealth Solutions Ltd.** Brookfield Wealth Solutions Ltd. is focused on securing the financial futures of individuals and institutions through a range of retirement services, wealth protection products and tailored capital solutions.

Brookfield Annuity is hiring a **Senior Analyst, Investments** to be part of the company’s Investments team. This role will report to the Chief Investment Officer and will have exposure to all aspects of the company’s investment function which includes portfolio reporting, trade reconciliations, investment review, and private credit management. Given our team-based approach, there is an opportunity to interact with other functions and departments, including actuarial, risk, finance, and compliance.

Responsibilities

- Develop and present reports on investment performance and risk. Monitor compliance with investment policies
- Collaborate with the investment and risk teams on asset modeling, cashflow, and sensitivity analysis
- Coordinate with senior team members on the implementation of the strategic asset allocation plan, monitor investment pipelines, and assist with execution of private investments
- Coordinate with the actuarial and finance teams on providing investment assumptions for actuarial modelling and business planning
- Liaise with the treasury, and operations teams to ensure proper liquidity management
- Ensure that relevant management information on investments and risk exposures is produced in a timely manner and disseminated to management and the board
- Perform due diligence on new asset classes in both the public and private markets
- Coordinate with Finance and investment managers on satisfying liquidity needs
- Assist in the establishment of robust processes to select fund managers (as appropriate), monitor their performance, adherence to mandates, and delivery in line with agreed operational requirements, actively addressing issues that may arise
- Monitor risk and management processes for all the key balance sheet risks, including interest rate, currency, and inflation

Required Skills and Experience

- Minimum of two years of relevant experience in investment roles, with exposure to fixed income, derivatives, and alternative assets
- Strong technical skills including the use of financial projection and ALM models
- Experience with annuity pricing and knowledge of insurance reporting and regulatory frameworks, a plus
- Bachelor’s degree in a finance or quantitative field of study a plus
- CFA designation an asset
- Strong capabilities in MS Excel, familiarity with VBA or Python preferred
- Experience with risk and investment management tools (Bloomberg, Aladdin, Clearwater), a plus

- Proven ability to interpret financial information, identify key issues based on this information, and propose controls and measures to address them
- Awareness and understanding of the wider business, economic and market environment in which the business operates
- Demonstrated and proven ability to work effectively in a team environment and maintain positive interpersonal relationships
- High attention to detail, intellectual curiosity, and motivation
- Excellent verbal and written communication skills

Please send your resume & any covering information you wish to provide to careers@brookfieldannuity.com (indicating role in email subject line).