



**KINGSDALE**  
Shareholder Services

## **Job Description**

# **Director, Shareholder Advisory**

Kingsdale Shareholder Services  
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## **Director, Shareholder Advisory**

### **I. Your Career as a Kingsdale Director**

Reporting to the Chief Operating Officer with accountability to the Vice President, Operations, the Director is an integral member of the Shareholder Advisory Group responsible for a full range of client management, reporting, research and sales support.

The Director has the primary responsibility to provide clients with advisory services and analysis while working with the Analyst team to prepare detailed reports.

Successful candidates will have the opportunity to work on North America's highest profile shareholder meetings, activist engagements and proxy contests.

### **II. How You Will Contribute**

- Participate in multiple Kingsdale business lines including Proxy Solicitation, Strategic & Defense Advisory, Shareholder Identification, Governance Advisory and Voting Analytics.
- Assist with preparation and review of documentation including public filings, press releases and proxy materials.
- Develop and maintain relationships with industry professionals (Front, Middle, Back Office).
- Conduct QA and work directly with Analysts to finalize client deliverables.
- Actively monitor for potential client opportunities within assigned client portfolio + prospects.
- Contribute to vulnerability analyses for contested situations and transactions.
- Prepare and interpret proxy voting reports for numerous public issuer annual and special shareholder meetings.
- Act as a liaison between intermediaries, transfer agents and custodians, exercising a high level of confidentiality and discretion.
- Attend Client/Shareholder/Corporate meetings or events as a Kingsdale representative.

### **III. Qualifications & Attributes:**

- **Reporting Skills, Attention to Detail, Deadline-Oriented, Client Confidentiality, Time Management, Dependability, Data Entry Management**
- Experienced team player with strong analytical and problem solving skills.
- Ability to prioritize and multi-task, meet deadlines in a dynamic, fast paced environment.
- Commitment to the quality of deliverables with the ability to resolve client issues before escalation in a professional manner.
- Reliable, responsible and motivated individual with excellent communication and presentation skills.
- Flexibility in hours, ability to work overtime if necessary.
- Demonstrated knowledge of Microsoft Office (Excel, Word, PowerPoint, etc.).
- University or College education in Business Administration or related discipline.
- 1-2 years of experience in data analysis, client management or similar role.