



Job Title: Client Relationship Manager

JOB DESCRIPTION

Los Angeles-based investment advisory firm is seeking a Client Relationship Manager to work closely with and serve as the primary advisor to new and existing clients. Clients include high-net-worth individuals and families, retirement plans and non-profits. Westmount Asset Management is one of the oldest and largest independent RIA firms in Los Angeles, with almost \$3 billion in assets under management.

Responsibilities: The primary responsibilities of the position involve the following:

- manage client relationships
- design customized investment and allocation plans
- introduce the financial planning process into each client relationship
- serve on the firm's Investment Advisory Committee

The Client Relationship Manager position provides tremendous opportunities for professional growth within the firm. Compensation and benefits are highly competitive.

Requirements:

- Bachelors degree and a minimum of 2+ years of investment experience and 4+ years of professional experience are required.
- Strong client focus and a proven ability to think in terms of the client experience and perspective.
- Highly motivated and personable with outstanding verbal and written communication skills, excellent judgment and analytical abilities, keen attention to detail and solid organizational skills.
- Advanced understanding of investments and an interpersonal skill set that enables you to discuss investments and financial planning topics with clients in an authoritative yet warm and engaging manner that inspires confidence.
- Desirable: CFP, CFA or tax or estate planning background.