WESTMOUNT

## Analyst

### Job Description:

The Wealth Management Full-time Analyst Program is a developmental 30 month program that provides an opportunity for entry-level employees to learn about the Wealth Management industry while obtaining the skills necessary to add value and succeed professionally at our firm. This role is geared towards candidates who have an interest in pursuing a career in Wealth Management as an Advisor, Financial Planner or in Business Development as an asset and client gatherer.

The Analyst will work closely with and provide support to Investment Advisors, Financial Planning Specialists, and Client Service Representatives. This role is a development track consisting of five business functions that provide a holistic view of the Wealth Management business with the aim of broadening knowledge of the offerings and services to our clients. Analysts will learn and work in the following business areas:

- Client Service
- Investment Management
- Operations & Trading
- Financial Planning
- Business Development

After completing the program, highly motivated Analysts will have an opportunity for further career growth within our firm.

### Responsibilities:

- Provide support to Investment Advisors, Financial Planners, Business Development and Client Service Representatives
- Assist the investment committee in the research and due diligence process for liquid and private investments
- Generate detailed reports and charts for team members on a scheduled or ad-hoc basis
- Update client materials for meetings and marketing purposes
- Maintain our client and prospect database
- Assist our Trading team in daily and systematic trades
- Perform other tasks as necessary

### Requirements:

- Bachelor's degree in Finance, Business Administration, Economics, Marketing or related business fields
- Demonstrated leadership qualities in school, work, or extracurricular activities
- Relevant work/internship experience
- Strong organizational, communication and analytical skills and the ability to effectively summarize findings, both verbally and in writing, in a clear and concise manner
- Ability to work effectively as a team and individually
- Strong proficiency in Microsoft Office
- Only local candidates will be considered

Analysts will be required to receive their Series 65 within six months of employment, sponsored by our firm.
Westmount encourages and sponsors further credentials such as CFP, CFA, CAIA, etc.

Interested candidates should send their resume to careers@westmount.com with "Analyst Program" as the email subject.

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2049 Century Park East, Suite 2500 Los Angeles, CA 90067
Telephone: 310-556-2502
Fax: 310-556-8661
Website: www.westmount.com
Email: careers@westmount.com