



Associate

Job Description:

Los Angeles-based investment advisory firm is seeking a mid-level, experienced Associate to work closely with Investment Advisors and new and existing clients. Clients include high net-worth individuals and families, retirement plans and non-profits. The Associate will interface with and service clients by phone, email and through in-person meetings. The Associate will also act as a liaison between clients, Investment Advisors and internal partners to respond to client needs and/or requests. The successful candidate will have an understanding of the investment industry and relevant financial markets to provide customer service and support the portfolio management process based on individual client objectives. Associates who perform at a high level and demonstrate superior capability will have the opportunity for further career advancement in the firm as Investment Advisors or Financial Planners.

Responsibilities:

The Associate will be responsible for managing client relationships and for providing support to the Investment Advisors and Business Development team. The role will also include developing and preparing materials used in client meetings, creating current portfolio reviews and portfolio analysis, maintaining client database, generating performance reports and metrics, and assisting in the investment management research process. The Associate will also oversee and train Analysts.

Requirements:

- Ideal candidates will have 3-5 years of work experience in the financial services/investment industry and a relevant understanding of the financial markets.
- Bachelor's degree in Accounting, Finance, Marketing, Business Administration, Economics or related business field.
- Strong organizational, communication and analytical skills and the ability to effectively summarize findings, both verbally and in writing, in a clear and concise manner.
- Detail-oriented and highly motivated with an interest in servicing clients in the Wealth Management industry.
- Ability to work effectively independently and within a team environment.
- Superior client service skills to help manage client relationships
- Strong Proficiency in Microsoft Office
- Series 65 certification required within first 3 months of employment
- Only local candidates will be considered

Local (Los Angeles-area) candidates only. Interested candidates should send their resume to careers@westmount.com with "Associate Program" as the email subject. APPLICATIONS WITHOUT A COVER LETTER WILL NOT BE CONSIDERED.