



## **Job Title: Business Development Officer**

### **JOB DESCRIPTION**

Los Angeles-based investment advisory firm is seeking a Business Development Officer to develop and maintain relationships with new and existing clients. Clients include high-net-worth individuals and families, retirement plans and non-profits. Territory: greater L.A. area or Orange County.

Our firm is one of the oldest and largest independent RIA firms in Los Angeles, with approximately \$3 billion in assets under management. You can learn more about Westmount at our website, [www.westmount.com](http://www.westmount.com).

### **Responsibilities**

The primary responsibilities of this position include developing new client relationships through any existing channels of business, networking with centers of influence (CPAs, trust attorneys, pension administrators), and working with Schwab's Advisor Network program.

Business Development Officer will work in tandem with the firm's Advisors in managing client relationships, which will include developing investment strategy, reviewing portfolio allocations and performance, and creating and reviewing financial plans.

### **Qualifications**

- Bachelors degree, 5+ years investment experience and 10+ years professional experience.
- Highly motivated and personable.
- Strong track record of developing and retaining business.
- Outstanding verbal communication and presentation skills.
- Direct experience and a solid understanding of the investment advisory industry.
- **Desirable:** CFP designation, existing relationships with centers of influence, transferable book of business.

### **Send cover letter and resume to:**

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