WESTMOUNT

Associate

Job Description:

Los Angeles-based investment advisory firm is seeking an experienced Associate to work closely with Advisors in serving the needs of the firm's clients. Our clients include high net-worth individuals and families, non-profit organizations and pension plans.

The Associate will provide support to our Advisors in several capacities, including client service, trading, financial planning, and investment analysis. The Associate will act as a liaison between clients and Advisors to respond to client needs and/or requests.

The successful candidate will have a demonstrated understanding of, and initial experience in, the investment industry and relevant financial markets. Associates who perform at a high level and demonstrate superior capability will have the opportunity for further career advancement in the firm as Advisors or Business Development professionals.

Responsibilities:

The Associate will be responsible for providing comprehensive support to our Advisors and Business Development professionals. Working in coordination with other members of the Associate team as well as our Advisors, the Associate will prepare materials used in client meetings, conduct routine daily trading of securities positions, interface with clients by phone and email to facilitate client requests, update the client database, generate financial plans via eMoney, and engage in various investment analysis projects at the request of members of our research team.

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
- Only local candidates will be considered

Local (Los Angeles-area) candidates only. Interested candidates should send their resume to careers@westmount.com.

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