Reference Number:
5674

Job Description:
You will join a five-person team that manages assets for high-net-worth individuals (in excess of $10 million).

The two principals are part of a select group of experienced professionals that work with a limited clientele, helping to craft customized, comprehensive wealth management plans.

The group acts as "Chief Investment Officers" for clients, providing a variety of services including: asset allocation and portfolio strategy, investment advisory services (cash, fixed income and equity management), alternative investments (private equity, private real estate, hedge funds, opportunistic vehicles), access to credit, and wealth advisory services (including trust, estate and philanthropic planning).

The business model leverages the financial strength of an integrated global powerhouse with comprehensive wealth management advisory and asset management services delivered in the context of a high-touch, client-focused investment boutique.

Training will be provided and afterwards you will be expected to perform most, if not all of the functions carried out by senior team members.

As a junior partner you will be called on to work closely with teammates, as well as with clients to solve problems.

You will be asked to build important relationships with those inside the firm as well as with partners outside so that you can better meet client needs and expectations.

Client is looking for a commitment of 3 years; position provides excellent training in how to manage a growing business along with experience in real world financial applications.

This is a perfect role for pre-MBAs and those pursuing their CFA, CFP or other professional designations.

SUMMARY OF REQUIREMENTS:

Analytical background with desire to learn about financial markets

1-3 years of professional experience preferred

QUALIFICATIONS:

Strong aptitude with numbers is a necessity and must have a high degree of comfort working with Excel spreadsheets and analyzing financial information.

Must possess a basic understanding of financial concepts (present value, IRR, etc.) and statistics and have a strong desire to learn as well as the ability to multi-task. Candidates should be detail-oriented, effective communicators (both verbal and written), and have an interest in the financial markets with the ability to distill vast amounts of information into a concise and cohesive format.

Someone who has demonstrated creativity in solving problems as well as excellent analytical and organizational skills.

Must be willing to not only work hard and meet challenges head-on but also maintain a great attitude and have fun.

1-3 years of professional experience is preferred though financial service experience is not required.

SEND RESUME AS AN MS WORD ATTACHMENT TO diane@dmstone.com