

Client Investment Associate

Are you looking for a career with an established investment firm? With more than \$3B in assets under management, Addison Avenue is the largest credit union investment services program in the nation! We're looking for two dynamic and service driven Client Investment Associates who are willing to go the extra mile for our members. We serve the employees of exciting technology companies such as Microsoft, Amazon, HP, Intel and others in the great Northwest!

Here's what you can expect from the job and what you need to be successful:

About the Role:

- Support our financial advisors with prospecting, marketing, sales and service of investment products.
- Schedule appointments from referrals, appointment follow ups and account reviews
- Ensure compliance requirements are met for FINRA, OSJ & Insurance agency regulators
- Coordinate the organizational needs of our financial advisors
- Manage relationships with the ability to use discretion and judgment when working with clients and matters of privacy
- Utilize technology for maximum efficiency

About You:

- 3 years' experience in a client facing support role with an investment/wealth management company
- Working knowledge of investment products
- Demonstrated organizational skills, attention to detail, and the ability to work under tight deadlines
- Ability to be self-directed with proven decision-making skills and sound judgment
- Series 7 & 63 FINRA licenses required
- Raymond James Advisor Access system knowledge preferred
- Bachelor's Degree in finance, business or related field preferred

Locations: Rose Hill Branch, Kirkland, WA 98033 **and** RidgePointe Branch, Bellevue, WA 98007

Other requirements: some travel

First Tech is not currently offering Visa sponsorship or transfers

On-line applications only, to apply: <http://bit.ly/2meWnIJ>