

EMPLOYMENT OPPORTUNITY

Associate Client Manager

Summary

Cornerstone Advisors, Inc., a comprehensive wealth management firm for high net worth individuals, families, and their related entities has an opening to join their team as an Associate Client Manager. You will be a member of the client management team caring for the financial assets of our clients in a thoughtful and prudent fashion.

Responsibilities

Main responsibilities of the individual in this position:

- Prepare quarterly and interim reports for client meetings
- Build and maintain comprehensive balance sheet for clients to track assets
- Listen to and articulate clients' short- and long-term goals
- Assist in helping clients select, implement, and monitor appropriate asset allocation
- Build strategic models to illustrate clients' current position and effects of saving / spending
- Coordinate and review estate planning design with clients and their attorneys
- Work collaboratively with client's CPA to coordinate needs and review strategy

The successful candidate will have skills and experiences including:

- Bachelor's degree in finance or other business-specific major
- 4-7+ years professional investment experience
- Industry license required; advanced degree and/or relevant designation a plus
- Strong analytical skills and knowledge of investment concepts
- Effective, proactive, and professional verbal and written communication
- Good relationship-building and interpersonal skills
- Intermediate knowledge of Microsoft Office software including Outlook, Excel

Skills

Process

- Ability to make decisions based on proven judgment and experience
- Excellent planning and organizational skills with ability to prioritize
- Excellent follow up skills and attention to detail
- Maintains the utmost discretion in working with sensitive and confidential information

Cornerstone's Application Process

We are looking for top talent to complement our team. We offer a challenging and fun work environment, competitive salary, and an excellent benefits package, including medical, dental, vision, 401K, life insurance, and flexible spending plan.

Please send cover letter and resume to:

Kristin Reed
Managing Director, Human Resources
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www.buildbeyond.com