



Associate Consultant

Firm Description

Prime Quadrant is an investment research and consulting firm that empowers family offices and ultra-high net worth investors to make better investment decisions. We are trusted advisors to over 100 families across the country with over \$13 billion in Assets under Consultation.*

Our culture is best described by what we call the Prime Quadrant PATH – we are **Purposeful**, **Authentic**, **Tenacious** and **Humble**. We love the work that we are privileged to do, the wonderful group of clients we are fortunate to serve and the exceptional team we have assembled. We have been on a strong growth trajectory for several years and are looking for a talented person with aligned values to join our team.

Role Description

The new role of Associate Consultant at Prime Quadrant will be part of a dedicated consulting team that provides portfolio management and investment consulting services to a group of ultra-high net worth families. This role entails a range of responsibilities to clients as well as to internal projects based on our strategic priorities as a company. We believe that this role offers a tremendous learning and career opportunity for people who have a passion for providing investment advice and want to work in a growing organization.

Primary Responsibilities

As an Associate Consultant, your primary responsibilities would be:

- Supporting all aspects of investment advisory to clients.
- Creating and preparing customized client investment reporting.
- Ensuring accurate investment execution.
- Communicating with clients and service providers on a regular basis.
- Supporting Prime Quadrant's Client Discovery and Know-Your-Client functions.

*For many of our clients, we provide consulting services for all of their assets and use the Assets Under Consultation metric of measurement as we believe we have an impact on all assets held by clients whether or not we directly introduced those assets to them or not. Assets Under Consultation is different from the more traditional Assets Under Management metric of measurement.

Projects

The Associate Consultant will contribute to the following Prime Quadrant projects currently underway:

- Centralization and systematization of client investment reporting data entry.
- Build-out of CRM towards storing and automating certain KYC and consulting team functions.
- Other Consulting projects that may arise from time to time.

Qualifications

- University degree.
- 3+ years of work experience in the financial services industry.
- Successful completion of the CFA Level 1 exam or CIM designation.

One or more of the following qualifications would be considered valuable:

- Business or Finance undergraduate concentration.
- 2+ years of work experience providing investment advice.
- Successful completion of two exams towards CFA or CAIA designation.
- Successful completion of the Exempt Market Products Exam.

Key attributes


- Strong Microsoft Office fluency (Excel, Word, OneNote, Teams).
- Poised with strong English writing and oral communication skills.
- Proven client service orientation – you get energy from helping people.
- High degree of accuracy, organization and a strong detail orientation.
- Flexible to work early or late on occasion and as needed.
- Able to multi-task, prioritize and collaborate in a fast-paced team environment.
- Desire to take part in special projects that elevate the client and team experience.

Compensation & Benefits

- Industry-competitive salary with a performance-based bonus structure.
- Health benefits via participation in the firm's health spending account.
- Financial support for continued education.
- Three weeks' vacation.
- Career advancement with demonstrated performance.

To express interest in this opportunity or for more information, please email

careers@primequadrant.com with the subject line “**Job Application - Associate Consultant**”. Please note that while we appreciate hearing from all qualified candidates, only those applicants whose background and experience align with our requirements will be contacted.



Prime Quadrant is committed to fair and accessible employment practices and we are committed to providing accommodations for persons with disabilities. If you require accommodations in order to apply for any job opportunities, or require this posting in an additional format, please contact us at careers@primequadrant.com or call 647 749-4118. If you are contacted by Prime Quadrant regarding a job opportunity or testing and require accommodation in any stage of the recruitment process, please use the above contact information. We will work with all applicants to determine appropriate accommodation for individual accessibility needs.