Consultant

Firm Description

Prime Quadrant is an investment research and consulting firm that empowers affluent families to make better investment decisions. We are trusted advisors to over 100 families across the country with over $15 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.

The Opportunity

The successful candidate will join a dedicated practice group that provides portfolio management and investment consulting services to affluent families. In the first year, responsibilities will focus on acting as the lead advisor for new client families and supporting a Senior Consultant within an existing practice group. The successful candidate would ideally wish to have their own practice group of client family relationships over time. We believe this role provides an excellent opportunity in a growing organization.

Key Attributes

- Proven professional with experience providing investment advice to affluent families or institutions.
- Investment knowledge on a broad range of asset classes, including Alternatives.
- Excellent verbal and written communication skills.
- High degree of accuracy and organization.
- Able to multi-task, prioritize and collaborate in a fast-paced team environment.
- Flexible to work as needed by clients.
- Desire to take part in special projects that elevate the client and team experience.
- Orientation towards helping people reach their goals and adding value in myriad ways.

Primary Responsibilities

Client Relationships

- Leading and managing relationships with new client families.
- Portfolio management responsibilities for client families on a discretionary and non-discretionary basis.
- Supporting a Senior Consultant on relationship management for existing client families.
- Creating, reviewing and/or delivering materials for client meetings.
- Identifying and advancing client family priorities beyond their investment portfolios.

Strategic Investment Planning

- Providing client families with ongoing advice and analysis related to asset allocation and portfolio construction.
- Drafting and/or reviewing Investment Policy Statements and presenting to client families.
- Reviewing new client families' existing investments for alignment with their overall risk- and return objectives.

Investment Recommendations

- Recommending investment opportunities and position sizing to client families within the context of their objectives, needs and overall assets.
- Coordinating with client families' tax advisors to help them assess asset placement considerations.
- Ensuring proper investment execution for client allocations, in concert with the Client Service and Operations Teams.

Reporting and Monitoring

- Providing client families with ongoing monitoring information on their investments and liaising with the Investment Team accordingly.
- Reviewing client families' Prime Quadrant investment reporting and overseeing the delivery of any custom portfolio analyses.
- Coordinating with internal team members to ensure all client reporting is presented accurately.

Qualifications

Candidates must have (i) relevant investment management experience as either an Advising Representative or Associate Advising Representative; and (ii) obtained the CFA or CIM designation.

Successful completion of the Exempt Market Products Exam would be required for the role but may be completed after the start date.

Compensation

- Industry competitive salary.
- Performance-based bonus structure.
- Health benefits via participation in the firm's health spending account.
- 4 weeks' vacation per annum.

*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.

Prime Quadrant Corp 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 Corp*** *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.*