

JOB DESCRIPTION

Title: Investment Management Associate

Supervisor Title: Director of Investment Management

JOB SUMMARY

The Investment Management Associate works as a member of the investment management team to conduct investment research, prepare investment recommendations and reports, and implement trading for the firm. This position is a member of the investment management committee and leads the execution of Aspyre Wealth Management's global fiduciary practices. They also support the wealth management team to provide client service.

JOB RESPONSIBILITIES

- Portfolio Management – Monitor client portfolios and trading screens. Generate investment recommendations for client portfolios as appropriate.
- Manage all investment management related systems, including Tamarac and Morningstar Direct.
- Execute all client portfolio trading
- Participate as a member of the investment management committee and lead execution of global fiduciary practices.
- Research and monitor model portfolio allocations and asset selection. Recommend allocation and fund changes to the investment management committee.
- Maintain client portfolio data for investment management purposes.
- Evaluate and make recommendations on investment options inside retirement accounts held outside of the firm's preferred custodians.
- Support the firm's compliance activity by running custom reports and periodically reviewing investment processes.
- Manage firm relationships with fund managers and investment related vendors.
- Understand and support delivery of the firm's financial planning processes.
- Provide client service directly or in conjunction with the wealth management team and participate in client meetings as needed.
- Provide scheduled and ad hoc written communication to clients.

JOB REQUIREMENTS

Education: Bachelor's degree from an accredited university required.

Licenses/Certifications: CIMA, CFP, or CFA preferred but not required.

EXPERIENCE:

Two years of experience in an investment management role is preferred.

OTHER:

Highly proficient computer skills are required, with the desire to master key software programs. Prior experience with Tamarac and Morningstar Direct is a plus. Excellent communication abilities and strong client service focus is required. Strong detail orientation with the ability to manage a variety of tasks and competing deadlines is essential.

Please send your resume' to Mimi Skinner at miskinner@aspyrewealth.com.