Position Available

Managing Director of Investments

San Francisco, CA

We have been retained by a client who is seeking a Managing Director of Investments for their new regional office in San Francisco, CA. The firm was co-founded by two prominent wealth management and investment principals who joined their private family offices. This is an exceptional early-stage opportunity with an independent privately-held firm whose executive leadership is among the most recognized in the industry.

The Managing Director of Investments (MDI) will be an “outsourced” regional CIO for clients. Candidates must have a successful and visible background in consultative investment management; and he or she must have the entrepreneurial spirit to help build and lead the region. It is also crucial that the MDI has a background as a consultative investment advisor managing UHNW or institutional client relationships. The MDI will be part of a highly collaborative and collegial multidisciplinary regional team that focuses on impeccable client service delivery. Cultural fit is as important as investment qualifications and the MDI must practice “confidence, not arrogance”.

The investment focus of this group is delivering a client-first, fully transparent and aligned investment model, including providing alternative investments products and direct private investments for their clients. The MDI will implement, monitor, and maintain investment philosophy for an open-architecture environment. This will include the development of the family investment policy, asset allocation, ongoing performance monitoring and evaluation, and will have extensive face-to-face interactions with UHNW clients. The MDI should have experience in public markets, hedge funds, private capital and direct investments.

Experience and Requirements:

- Minimum of 10+ years of experience in a consultative investment role with demonstrated success in managing relationships with and delivering advice to ultra-affluent clients, business leaders and/or large institutional investors.
- Bachelor’s degree required; CFA designation and/or CAIA preferred.
- Investment advisory experience should include all aspects of the investment management process including objective setting, asset allocation and investment policy, strategy, implementation, and on-going monitoring and evaluation
- Possess a deep understanding of complex investment solutions including absolute return strategies, private capital funds, real estate and direct investments
- Experience in managing relationships with sophisticated and demanding individuals and/or fiduciaries with complex needs

Demonstrated experience in contributing to business development

For confidential consideration please forward your resume to jeannie@braysearch.com. Candidates who meet the criteria may call Buzz Bray for a confidential discussion at 206-402-3401.