

## ASSOCIATE ADVISOR

Bray Executive Search, formerly RMG Associates, is a national executive search firm specializing in private wealth management. We have been retained by a nationally recognized multifamily-office who is seeking an Associate Advisor for their regional office in Seattle, WA.

This prestigious, independent partnership is recognized as one of the leading wealth advisories in the industry. They have developed a platform and business model for the UHNW client segment allowing for highly customized and sophisticated solutions. The firm provides an encompassing, holistic scope of wealth management services including: investment management and impact investing, estate and tax planning, legacy/stewardship/governance consultancy, family education, philanthropy, trust and fiduciary services, and financial administration.

The main role of Associate Advisor is to work with senior team members with any and all client and wealth advisory related material and communication. Advisors provide financial presentations and analytical support and help to ensure consistency across all client relationships and across all offices. Over time, an advisor is expected to gain an understanding of individual client relationships and eventually provide proactive support to senior Client Team members and directly to the clients as well. This firm offers an impeccable service platform and reputation, a tremendously talented team, and collegial environment.

### Job Responsibilities

- Carry out the day-to-day delivery of wealth advisory management services under the supervision of senior Client Team members
- Create customized client presentations including investment charts and analysis as well as estate planning recommendations
- Complete projects involving analyzing client holdings and investments including forecasting
- Review investment portfolio allocations; review performance reports
- Execute investment programs under senior direction and place trades
- Communicate with clients and their advisors; assist with documentation relating to account profiles
- Assist with business development efforts

### Qualifications

- Two to three years of related experience and/or education/training
- BA/BS degree; prefer economics/business major or relevant coursework and/or experience
- Excellent communication skills – written and verbal, superior analytical skills
- High proficiency with Microsoft Excel, PowerPoint and Word with ability to quickly learn new systems such as performance reporting, data/transaction aggregation, data analytics, CRM
- Able to multi-task, be exceptionally organized, and have extreme attention to detail
- Ability to work within a team environment while also being a self-starter

To apply, please submit your resume to [jeannie@braysearch.com](mailto:jeannie@braysearch.com). For more information for qualified candidates, please call Buzz Bray at (206) 402-3401. All inquiries and applications will be held in strict confidence.