



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.

ABOUT ASPYRE WEALTH PARTNERS

Aspyre Wealth Partners strives to help people lead the life they want. Our clients don't work 60 hours a week for money only and the hope they can one day "retire". They work to utilize their talents, contribute and build financial wealth to accomplish things – such as funding children's college tuition, caring for elderly parents, traveling to places long dreamed of-- living the lifestyle they desire. Whatever THEIR story, Aspyre strives to help them achieve it. During every phase of life, we are here to help clients plan and take action to accomplish their goals.

Website: www.aspyrewealth.com

OFFERED EMPLOYEE BENEFITS

- Retirement Plan
- Health Insurance
- Life and Disability Insurance
- Paid Time Off

TO APPLY

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