Kayne Anderson Rudnick
Wealth Advisors

JOB TITLE: Wealth Advisor REPORTS TO: EVP	**DEPT**: 4080- Wealth Advisory

Kayne Anderson Rudnick Investment Management a Registered Investment Advisor based in Los Angeles, is currently searching for a Wealth Advisor.

The Kayne Anderson Rudnick Wealth Advisor (KAR WA) will support a Senior Wealth Advisor in the management of their client base, providing the Senior Wealth Advisor capacity to continue to grow their business.

The KAR WA will assume all aspects of providing excellent service, by being designated as the “primary contact”, to a book of clients designated by the Senior Wealth Advisor, while keeping him updated on all important conversations and activities of these clients.

The KAR WA will manage day-to-day inquiries from the clients and will perform client portfolio review meetings, solely, after a period of training by the Senior Wealth Advisor and will perform ongoing monitoring of the client portfolios and communicate any issue to the KAR Senior Wealth Advisor. In addition, they are expected to coordinate information with the client’s CPA, estate attorney and other advisors.

The KAR WA will be expected to proactively seek opportunities for client referrals and “share of wallet” opportunities with the clients they service.

The KAR WA is expected to provide financial planning advise to all clients of the Senior Wealth Advisor. The KAR WA will be working within a team that supports the Senior Wealth Advisor client base, and is expected to work collaboratively with other team members to provide excellent client service to the Senior Wealth Advisor clients.

DUTIES AND RESPONSIBILITIES:

- Develop strategies to provide a high quality client experience, with the goal of assisting the KAR Senior WA build their practice through referrals and additional funding from existing clients
- Provide financial planning advise, utilizing the eMoney financial planning platform, to assist clients with their financial planning needs
- Prepare customized investment proposals
- Provide general support of the new business development activities of the KAR Senior WA. These responsibilities include performing detailed analysis of prospective client portfolios.
- Perform client portfolio review meetings solely and communicate any follow-up items to the KAR Senior WA
- Perform important projects, as requested by the KAR Senior WA, to support new business development and client service activities
- Provide proactive communication to clients
- Manage complex client requests
- Manage ongoing tax management strategies for clients
- Participate in prospective client meetings with the KAR Senior WA
- Participate in client events created by the firm

MINIMUM QUALIFICATIONS:

- 5+ years of experience in the financial services industry providing a high level of wealth advisory client service.
- Financial planning/wealth management acumen, judgment and experience.
- Articulate, confident, and driven professional with the ability to work with a team-oriented culture in a results-oriented, growing environment

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- Unimpeachable ethical standards and a strong work ethic
- Desire/ability to work successfully in a small company environment with a culture of provides opportunities for professional growth, yet expecting accountability
- Superior communication skills both oral and written; strong presentation skills
- A demonstrated ability to establish priorities and meet goals
- Ability to collaborate within a team in a professional and constructive manner
- Confident in interacting with high net worth individuals in a manner that exceeds their expectations
- Proficient in the Microsoft operating platform, the eMoney financial planning platform and the Salesforce CRM platform
- Financial planning/wealth management acumen, judgement and experience
- FINRA Series 7 license preferred
- A bachelor's degree required from an accredited college or university with an educational background in finance or economics; CFP designation (preferred); MBA (ideal).

BENEFITS:

- Competitive salary
- 401k plan
- Medical/Dental
- Paid Parking
- Potential for bonus participation

If you meet the qualifications and are interested in the position, please submit resume to recruiting@kayne.com.

A competitive compensation will be offered. Details will be discussed at the appropriate time with interested, qualified candidates.