Kayne Anderson Rudnick

JOB DESCRIPTION

Senior Wealth Advisor

Kayne Anderson Rudnick (KAR), a Registered Investment Advisor based in Los Angeles, is currently searching for an experienced Senior Wealth Advisor to cover the Orange County/San Diego/San Francisco territory.

The qualified candidate should be an aggressive business builder with contacts and relationships in the community. In addition, a strong understanding of the investment management process and sensitivity to the particular needs of wealthy individuals is of primary importance. The individual must be able to develop and maintain client relationships and assist in coordinating the portfolio management process.

Candidate prerequisites include significant experience as a successful salesperson within a financial institution. A broad understanding of the global financial markets is beneficial. Finally, this individual must have the ability to interact with all parts of the Kayne Anderson Rudnick organization.

The Senior Wealth Advisor will be responsible for new business development along with ongoing client service, focusing on high-net-worth and ultra-high-net-worth clients.

PRIMARY DUTIES AND RESPONSIBLITIES

- Perform new business development activities on behalf of the firm, focusing on the high-net-worth and ultra-high-net-worth markets.
- Responsible for ongoing client service, in the form of semi-annual or annual portfolio review meetings to update clients on portfolio performance and capital market outlook.
- Execute a direct marketing program to “Centers of Influence” such as CPA’s, estate planning attorneys and insurance professionals.
- Develop a referral program from existing client base.
- Deliver both conceptual and technical marketing/sales and implementation of ideas. Comfortable with explaining investment strategy, dealing with performance numbers and a good technical understanding of the products and services offered.
- Identify client needs and suggest innovative solutions.

QUALIFICATIONS:

- 2 to 4 years relevant investment experience
- Minimum 3 to 5 years of experience in investment management and/or financial advisory services with demonstrated ability to develop and manage client relationships.
- Financial planning/wealth management acumen, judgment and experience.
- Clear understanding of a long-term consultative sales process, with the ability to prospect for and win new business. A successful track record in sales, new business development and client retention.

- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as financial planning and securities balancing software.
- Team player with strong coaching and leadership skills; excellent relationship management skills.
- Superior communications skills both oral and written; strong presentation skills.
- A demonstrated ability to establish priorities and meet goals.
- Ability to communicate effectively to prospective client with varying degrees of investment knowledge.
- Client first attitude.
- Articulate, confident, driven professional with the ability to work with like-minded professionals in a results-oriented, fast-paced and growing environment.
- Unimpeachable ethical standards and a strong work ethic.
- Desire/ability to work successfully in a small company environment.
- A bachelor's degree required from an accredited college or university; 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 careers@kayne.com.

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

For additional general information on Kayne Anderson Rudnick, please access the firm's web site at www.kayne.com.