Kayne Anderson Rudnick

JOB DESCRIPTION

Senior Investment Advisor Associate

Century City-based wealth and investment management firm with over $50 billion in assets under management is seeking an exceptional individual to join our Wealth Advisory Group as Senior Investment Advisor Associate.

The successful candidate will work as part of a growth-focused advisory team to provide a professional and exceptional level of client service to affluent investors.

PRIMARY DUTIES AND RESPONSIBLITIES

- Act as primary service related and administrative contact for high-net-worth investors and their professional advisors (CPA'S, business managers, attorney's).
- Act as project lead or participate extensively in department or firm level projects.
- Open new accounts and monitor progress.
- Provide daily client service, including but not limited to, investing deposits, calculating withdrawals, handling cashiering needs, facilitating tax trading, charitable gifting, required minimum distributions, special requests, account re-registrations, cost basis step up, custom report creation, address changes, and account terminations, and preparing tax analysis reports.
- Execute asset allocation changes based on Advisor recommendation and monitor progress.
- Schedule Advisor-Client meetings and prepare portfolio review book materials.
- Attend in house or off site meetings or events as requested by Advisor.
- Maintain and update client files, CRM and other portfolio data, as needed.
- Collaborate with management to improve practices and procedures.

QUALIFICATIONS:

- Undergraduate degree
- Series 7 preferred
- 5 + years client service working with high net worth individuals at an investment management firm, private bank, or broker/dealer with history of increasing responsibilities.
- Fundamental knowledge of equity and fixed income markets and alternative asset classes
- Knowledge of nuances in setting up various account registrations, including documentation required and limitations behind such registrations.
- Experience with and knowledge of paperwork and workflow associated with custodians such as Charles Schwab and/or Fidelity Investments.
- Commitment to, and demonstrated history of, providing the best service levels to clients as well as to internal constituents.

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.