Kayne Anderson Rudnick

JOB DESCRIPTION

Senior Investment Advisor Associate

Kayne Anderson Rudnick Investment Management in Century City is seeking a highly motivated, organized, committed individual with strong initiative and excellent communication skills for the role of Senior Investment Advisor Associate-(Client Service Support). 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 AT KAR:

In addition to health insurance, Vacation, PTO benefits and a generous 401(k) company match, KAR is proud to offer its employees benefits:

- Competitive Pay
- Medical, Dental, and Vision Insurance
- Wellness Program
- Tuition Reimbursement
- 24-Hour Employee Assistance Program
- Adoption Assistance
- Paid Family Care Time
- Life and Disability Insurance
- Health Savings Account with a Company Match
- Flexible Spending Accounts including Dependent Care
- Paid Volunteer days

COVID-19 Hiring:

During the pandemic, we have transitioned to a work-from-home environment until further notice. We plan to return to our office when it is safe to do so. Attendance in person at our office will be required at that time.

KAR is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, or veteran status.

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.