Sr. Investment Analyst

As an integral part of Bleakley Financial Group, the Investment Analyst works closely with a wealth advisor and junior partner in providing them with fully integrated wealth management proposals. The Investment Analyst is involved in helping to manage all tactical activities associated with client accounts and planning. This includes coordinating investment management and review of client portfolios to maintain and verify that they are properly aligned to their target allocations.

**Essential Functions:**

- Performs portfolio reviews and assessments including asset location for tax optimization.
- Provides proactive advisor service both individually and collaboratively.
- Reviews, edits and updates proposals prior to client presentations. May participate in presenting specified components of the financial plan.
- Manages and updates portfolio rebalances for implementation schedules.
- Works within an as needed basis with Advisor(s) in scheduling client review meetings, and providing appropriate follow-up.
- Participates in the portfolio review/monitoring process and works in collaboration with investment and financial planning team to manage cash flow, tax issues, etc. associated with client portfolios.
- Ability to research items that may include, portfolio performance holdings and abnormalities within client portfolios and are able to explain to Advisor(s).
- Create custom reviews and reports for multiple clients to provide updates on client portfolios, highlighting important investment related items and making trades, if necessary, to align portfolios with clients' goals.
- Maintain/update Excel database that tracks when each client is due for review, their current review schedule and the date of their most recent review
- Set-up, update and maintain trading software, RedBlack to help streamline the process of aligning clients' portfolios with their stated goals.

**Education/Experience:**

- Bachelor's degree required. Major in math, finance, accounting, or business preferred
- CFP, CFA, or other similar certificates recommended
- A minimum of five (5) years of experience in financial services and caring for client relationships, preferably within an RIA environment
- A fundamental knowledge of wealth management and client relationship management principles
- Experience providing support to diverse segments of the client marketplace, including the generating of reports, client data analysis, and presentation preparation
- Comfort and expertise in a range of communication skills (oral, written, presentations, electronic)
- Demonstrated technical capabilities in the various areas of an integrated planning platform preferred, including proven experience with client relationship management (CRM) software and MS Office solutions
- Experience with trading systems/platforms such as RedBlack, TRX, eMoney, RedBlack preferred

**About Bleakley Financial Group**

For over 30 years, the advisors at Bleakley Financial Group have provided financial planning and wealth management services to clients throughout the country. As an independent firm with a small client-to-advisor ratio, Bleakley's advice and guidance is personalized, objective and focused on client success. The company has an experienced team of over 100 investment professionals. With approximately $5.5 billion in assets under advisement, Bleakley puts its size and independence to work toward meeting clients' financial goals. Visit www.bleakley.com