WESTMOUNT

Job Title: Associate

About Westmount

Since we established Westmount in 1990, our vision has been clear. Be an incubator for innovative thinking, whether that's being one of the earliest firms to adopt a business model that puts clients' interests first, embracing alternative investments like real estate and private debt, or providing leading-edge financial planning. There's something else: our people. Westmount strives to be a magnet for the top talent in wealth management by providing thoughtful mentoring, a supportive environment for growth and the freedom to pursue fresh new ideas on behalf of our clients. That mindset has allowed us to assemble one of the sharpest, most dynamic advisory teams in LA.

Responsibilities

The Associate will be responsible for providing comprehensive support to our Advisors and Business Development professionals. Working in coordination with other members of the Associate team as well as our Advisors, the Associate will prepare materials used in client meetings, conduct routine daily trading of securities positions, interface with clients by phone and email to facilitate client requests, update the client database, generate financial plans via eMoney, and engage in various investment analysis projects at the request of members of our research team.

The successful candidate will have a demonstrated understanding of, and initial experience in, the investment industry and relevant financial markets. Associates who perform at a high level and demonstrate superior capability will have the opportunity for further career advancement in the firm as Advisors or Business Development professionals.

Requirements

- Ideal candidates will have at least three years of work experience in the financial services/investment industry and a relevant understanding of the financial markets.
- Bachelor's degree in Accounting, Finance, Marketing, Business Administration, Economics or related business field.
- Strong organizational, communication and analytical skills and the ability to effectively summarize findings, both verbally and in writing, in a clear and concise manner.
- Detail-oriented and highly motivated with an interest in servicing clients in the Wealth Management industry.
- Ability to work effectively independently and within a team environment.
- Superior client service skills to help manage client relationships.
- CFP or other industry certification is a plus.
- Strong proficiency in Microsoft Office.
- Only local candidates will be considered.

Interested candidates should send their resume to careers@westmount.com.