



## **Job Title: Business Development Officer**

### **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 primary responsibilities of this position include developing new client relationships through any existing channels of business, networking with centers of influence (CPAs, trust attorneys, pension administrators), and working with the firm's custodial referral program.

Business Development Officer will work in tandem with the firm's Advisors in managing client relationships, which will include developing investment strategy, reviewing portfolio allocations and performance, and creating and reviewing financial plans.

### **Qualifications**

- Bachelors degree, 5+ years investment experience and 10+ years professional experience.
- Highly motivated and personable.
- Strong track record of developing and retaining business.
- Outstanding verbal communication and presentation skills.
- Direct experience and a solid understanding of the investment advisory industry.
- **Desirable:** CFP designation, existing relationships with centers of influence, transferable book of business.

Interested candidates should send their resume to [careers@westmount.com](mailto:careers@westmount.com).