



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.

The Role

The Associate is a core member of our advisory team, responsible for delivering exceptional client service and ensuring portfolios are implemented accurately and efficiently.

This is a client-facing role focused on service, trading, and operational execution. Associates work closely with Advisors to support specific client relationships and are expected to be responsive, detail-oriented, and professional in all interactions.

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.

Responsibilities

- Serve as a point of contact for assigned client relationships
 - Prepare materials for client meetings and track follow-up items
 - Execute routine trading and monitor portfolio allocations and cash flows
 - Coordinate account openings, transfers, and money movements
 - Maintain and update client information within CRM and internal systems
 - Support Advisors with investment-related analysis and client requests
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Requirements

- Bachelor's degree in Business Administration, Economics, Finance, or related business field
- 0–2 years of professional experience; internship or prior exposure to financial services or wealth management preferred
- Strong organizational, analytical, and communication skills
- High attention to detail and commitment to accuracy
- Professional demeanor and strong client service orientation
- Ability to work effectively both independently and within a team environment
- Strong proficiency in Microsoft Office, particularly Excel
- Will be required to obtain the Series 65 license or equivalent within the first 90 days of employment (firm-sponsored)

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