

Investment Advisor

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Company: Staffing In Motion

Location: India

Category: business-and-financial-operations

Job Description

This role is with a large Portfolio Management firm with over \$200 billion in assets under management. Each client would have a separately managed portfolio based on their risk tolerance and asset allocation preference. Portfolios are managed on a discretionary basis.

This is a relationship manager role where you are given a book of 150-200 households (\$100 million to \$150 million in assets) of high net worth clients with assets in excess of 500k (per household). You are responsible for managing these client relationships and speaking to clients about their portfolios/investments.

As the central point of contact for your assigned client base, you would educate each of our clients on the firm's investment philosophy, explaining why we've made certain decisions for their particular portfolio, and helping them understand events in the stock market - all to help each of our clients stay on track to achieve their long-term financial goals.

Due to the pay transparency laws that have gone in effect, I am disclosing the full salary range for the position. This includes the highest paid employee at the firm \$85,000-\$120,000 + discretionary bonuses.

However, realistically new hires should expect to start on the lower end of the compensation range, at around \$85,000-\$95,000 + bonuses (\$20,000-30,000).

Benefits: 100% coverage on all health/medical, dental and vision care for you and any dependents and 401k matching.

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