

Investment Professional – Albany, New York

Top Financial Counseling Firm, subsidiary of one of the premier Investment Banking companies seeks individual experienced dealing with High Net Worth client base to join a growing business in their organization. Will work collaboratively with Account Managers to develop and maintain relationships with individuals and /or families with portfolios of \$10 to \$20 million. Will develop investment plans for clients utilizing varied investment alternatives. Will eventually handle 40 to 50 clients with the support of a client analyst group. Seek minimum of 5 to 8 years experience working with HNW portfolios of \$10+ mm. If do not possess, must be willing to obtain the series 7,66, and 3. CFA and or MBA strongly preferred.

Competitive compensation package. Client would be willing to relocate if individual is outside this geography.

For confidential consideration please call, send or email resume to:

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