

Investment Professional – Prestigious Albany Firm

Top Financial Counseling Firm, subsidiary of one of the most prestigious Investment Banking firms seeks individual dealing with High End client base to join a growing group in their organization. Will maintain relationships with individuals and/or families with portfolios of \$10 to \$20 million. Will put together investment plans using varied investment alternatives. Will handle 40 to 50 clients with the support of a client analyst group. Seek minimum of 7 to 10 years experience. Series 3,7, 63, and 66 preferred. If do not have, must be willing to attain all of these in near future. BA required. Advanced degree and/or CFA preferred.

Competitive compensation package. Would be willing to relocate if individual is outside this geography. For confidential consideration please call, send or email resume to:

Elissa J. Curtis
Sr. Search Consultant
Cochran, Cochran & Yale, LLC
955 E. Henrietta Road
Rochester, NY 14623
ejc@ccy.com
www.ccy.com
585-424-6060