



## Grant Street Asset Management: Associate Wealth Advisor

### **Why Work for Grant Street Asset Management?**

- Grant Street is a 2<sup>nd</sup> generation employee-owned independent registered investment advisor. We have been working with families, business owners, physicians' groups and not-for-profit institutions as fiduciaries for 29 years.
- We manage over \$600 million in assets and have clients across the United States. Our headquarters is in Pittsburgh, PA (Southpointe office park in Canonsburg). A second office is located in Charlotte, NC.
- Our vision is to be our clients' most trusted and relied upon resource for all their financial needs.
- Our vision for our team is to hire, retain and grow the best professionals in the business in a culture of teamwork, friendship, hard work, respect and accountability.
- Firm is embarking on a growth trajectory and transitioning with a 2nd generation ownership team. Significant opportunity for advancement exists for the right candidate.
- GSAM believes in developing expert advisors that provide custom solutions to our clients' needs.
- Attractive healthcare benefits and profit-sharing plan available for all employees. Advisors also eligible for revenue sharing plan for new assets brought to the firm.
- Hybrid work schedule is available.

### **Job Summary:**

The focus of this position is working with and through others, building and maintaining relationships, and working closely and accurately within established guidelines. There is a need for an effective communicator, someone who is able to stimulate and motivate others while being aware of and responsive to their needs and concerns. There will be many different people to meet and work with. The person in this position must be friendly and genuinely interested in the business, agenda, and needs of others, including the company, its management, the team, the company's customers, or all of the above.

A faster-than-average pace will be the norm for this position. Detail work is a major focus of the job, and those details need to be handled quickly, correctly, and efficiently. This portion of the work will often focus on relationships with others; correct handling of details dealing with others is necessary to maintain and grow relationships. As time is usually a factor, the work must be done on time, as well as correctly. In general, this is a position where guidelines, structure, and established policies must be followed fairly closely, while working with and for others.

### **Job Duties and Requirements:**

#### **Senior Advisor Support**

- Attend client meeting with senior advisors, support advisors in completing meeting follow-ups.
- Assist in onboarding new clients: draft strategy letters, manage new account paperwork and provide regular communication in partnership with senior advisor.



- Financial Planning: Input data and draft initial financial plans for senior advisors; adjust as directed; confidently coordinate information with clients' other financial professionals (CPAs, estate attorneys, insurance and lending professionals) via telephone or in meetings with advisors; incorporate tax, estate, insurance and other planning related details into big-picture strategies for clients with senior advisor's assistance.
- Assist senior advisor in preparation for client and prospect meetings. Prepare to present, as requested, in private wealth review meetings or institutional board presentations.

### **Client Service**

- Serve as a reliable secondary relationship contact for clients to reinforce the team approach to service. Promptly return calls/emails on behalf of advisory team.
- Assist the client wherever necessary – embrace mantra “never give the client an assignment”.
- Work hard to earn and deserve clients' trust and confidence.

### **Investment Management / Research Due Diligence**

- Contribute bi-weekly Investment Committee content, agenda and supporting materials and new ideas through reading, market research, meetings with industry reps and economic analysis.
- Contribute to draft quarterly report letter for client reports.
- Serve as a co-portfolio manager with senior wealth advisors to implement investment strategies and trade client portfolios.
- Understand portfolio performance to evaluate positions' impact on portfolios.

### **Professional Skills/Attributes Required:**

- Undergraduate and/or graduate degree in related field and/or 5 years of related experience.
- Ideal candidate will have earned at least one CFP/CFA/CPA/CIMA designation or have made significant progress toward achievement.
- Prior experience/education in planning, investments and/or portfolio management.
- Qualities: self-starter, service-oriented, conscientious, precise, comfortable leading conversations and sharing ideas, enjoys variety and able to work at a fast pace with multiple priorities.
- Strong verbal and written communication skills. Ability to consistently apply appropriate punctuation and grammar to written communications is essential.
- Excellent presentation and interpersonal skills.
- Series 65/66 ideal and will be required once employed. Series 7 not sponsored and will expire.
- Software utilized: Tamarac Advisor View and CRM; MoneyGuidePro; Morningstar Direct.