Grant Street Asset Management: Senior Wealth Advisor

Why Work for Grant Street Asset Management?

- Grant Street is a 2nd 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.
- 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 job is on achieving results which are aligned with the larger picture of the organization and its strategic goals. Initiative, coupled with a sense of competitive drive, and the ability to stay focused on results despite changing conditions, is the key to achieving the performance objectives of this job. Because environmental and organizational conditions change rapidly, the work involves innovation and creativity in generating ideas for quick response.

Decision-making is focused on implementing practical, timely solutions. The job requires getting things done quickly and handling a variety of activities. Self-assurance, and the confidence to purposely drive toward results while constantly problem-solving and engaging the commitment of others is essential. A leadership style that is firm and goal oriented, and yet motivates, trains, and engages others in an enthusiastic way is important.

The emphasis on building rapport and relationships with individuals and groups requires an outgoing, poised and persuasive communication style. Because the pace of the work is faster than average, the ability to learn quickly and thoroughly while continually recognizing and adapting to changing conditions is critical. The scope of the job may require effective delegation to proven people. Especially routine and repetitive details should be delegated but with responsibility for follow up and accountability for timely results.

While the job requires the ability to act independently, a sense of urgency and the confidence to handle a variety of challenges, a full commitment to the success of the business and high standards of achievement are expected in this position. The emphasis is on results, and effective systems that achieve results through and with people, rather than on the details of implementation. The job environment is flexible, constantly changing and provides growth opportunity, recognition and reward for the achievement of business results.

Job Duties and Requirements:

Business Development

- Represent GSAM culture, service standards and philosophy in all professional interactions, both in person and written.
- Develop a personal sales and marketing plan to generate leads and referrals for new assets under management.
- Collaborate with senior management on firm's sales and marketing strategy.
- Proactively build and develop personal network to acquire new client relationships and strengthen relationships with potential centers of influence.
- Initiate and participate in sales meetings with prospective clients.
- Achieve personal revenue/AUM targets.

Client Service

- Frequent communication with clients and their other professionals (tax, estate, insurance, etc.) for a coordinated approach to wealth management.
- Deep understanding of investments to discuss strategies, market trends and explain performance.
- Prepare for meetings and present to clients, including institutional boards
- Earn and deserve clients' trust and confidence.
- Coordinate and collaborate internally with associate advisors and various support functions to most efficiently and professionally service clients.

Financial Planning

- Get to know client's entire financial picture and family situation to develop useful long-term financial plans.
- Familiarity with estate planning, tax and philanthropy strategies to provide solutions. Coordinate with client's estate counsel, tax professional and other providers where expertise is needed.

Investment Management

- Ability to establish client investment goals, objectives, asset allocation and investment strategies and guide clients with regard to risk and reward.
- Participate as a member of the Investment Committee and portfolio manager for client portfolios.
- Understand portfolio performance and communicate positions' impact on portfolios.

Professional Skills/Attributes Required:

- Undergraduate and/or graduate degree in related field and/or 8 years of related experience.
- Ideal candidate will have earned at least one CFP/CFA/CPA/CIMA designation or have made significant progress toward achievement. Broad knowledge of certifications not earned is ideal.
- Enthusiasm to work closely with clients and build caring personal relationships with clients, their families and coworkers.
- Qualities: independent, assertive and self-confident, able to manage multiple priorities, comfortable under pressure and able to lead conversations.
- Strong verbal and written communication skills. Ability to consistently apply appropriate punctuation and grammar to written communications is essential.
- Excellent presentation and interpersonal skills.
- Leadership training/coaching or prior management experience.
- 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.