Porter, White & Company

Investment Job Description

Financial Planning Analyst / Client Service Administrator
November 2020

I. About the Job

Porter White & Company, a leading independent investment management firm located in Birmingham, Alabama is looking to fill a Financial Planning / Client Service Analyst position. Our investment management practice manages over $450 million in assets for over 100 clients providing full wealth management services for high net worth individuals and families.

The ideal candidate is one who is interested in learning the necessary skills and developing a career in wealth management. The candidate should possess strong analytical skills, close attention to detail and capacity to learn financial concepts and interpret financial documents to aid in the analysis of a client's situation and development of customized financial plans.

The successful candidate will work primarily preparing information for client meetings, attending client meetings, preparing investment analysis, managing the day-to-day account management activities, and collaborating with other team members to produce client presentations and reports. Additional detail on job duties is included below. The position is designed to provide the right candidate the opportunity to grow into a full-time financial planner and would need (or be willing to obtain) a CFP designation.

II. Duties

Duties of this job include the following

- Prepare client reports and assist with data gathering
- Assist with investment research, reporting and implementation
- Analyze and interpret data for use in preparing client presentations and research papers
- Write investment management and financial planning content for marketing and education purposes
- Assist in the preparation of financial plans
- Maintain client relationships responding to client requests in a professional manner continually aspiring to deliver beyond the expected
- Maintain / manage client relationship using CRM application (Salesforce)
- Setup and maintain client investment accounts with custodians (Fidelity)
- Coordinate and schedule internal and client meetings
- Research and implement technology solutions that can improve practice efficiency
- Assist with general office administration
- Assist with marketing efforts, including events, email marketing, social media, and web.

III. Qualifications

A. Experience / Education

- Bachelor's degree in finance or related field
- 2+ years' experience in financial planning or analysis, preferred
- CFP designation or CFA candidate a plus
- Familiarity with financial concepts and products

B. Skills

- Strong organizational, analytical and communication skills
- Ability to take initiative and ownership and see a project through to completion
- Ability to juggle multiple tasks and meet deadlines
- A high level of proficiency with software applications including knowledge of:
    - Microsoft Office (Word, PowerPoint, Excel)
    - CRM applications (Salesforce), and
    - Financial planning-based programs (E-Money, Advent APX).
- Presentation and interpersonal skills needed to successfully interact with prospects, clients, financial professionals, and other associates.

C. Attributes

- Enthusiastic, high-energy, hard-working, self-motivated, disciplined, organized, client satisfaction oriented, warm, friendly, professional and intelligent.
- Ability to work effectively with and add value to a goal-oriented team in both the investment management practice and the firm as a whole.
- Strong quantitative and writing skills and good attention to detail.
- Must have high ethical standards, integrity, and ability to maintain confidentiality of sensitive financial information.

IV. Compensation / Benefits

We offer a competitive salary commensurate with experience and education and an incentive bonus program, as well as opportunities for personal and professional growth. We also offer the potential for a flexible work schedule over time. In addition to salary, employees receive benefits including health insurance, paid time off, and 401k / Profit-Sharing Plan.

Interested candidates may send a resume, cover letter, and transcript to Kathryn Lavender (kathryn@pwco.com).