

Senior Investment Assistant – Phoenix - 85016

Harris N.A. is an integrated financial service organization providing personal, business, corporate and institutional clients with banking, lending, investing, and financial management solutions. We are deeply committed to a high performance culture; one that values diversity, continuous learning, employee commitment and community involvement.

The Senior Investment Assistant provides day-to-day support to two or more Portfolio Managers and plays an integral role within the Private Bank relationship delivery team. This includes monitoring client's cash management position, preparing meeting booklets for customers and prospects, responding to and resolving customer and internal inquiries, completing appropriate account/portfolio documentation, updating investment management/trust systems to reflect current information on client accounts, filing documents and generating customized customer reports.

Knowledge & Skills:

- Bachelors Degree preferred or equivalent work experience
- General knowledge of financial markets and investments
- Excellent customer relations/interpersonal skills
- Strong organizational skills
- Proficient in Word, Excel and PowerPoint
- Needs to work in a team oriented structure delivering to Private Bank clients

Office Location: 2375 E. Camelback Road, Suite 150, Phoenix, Arizona 85016

We reward our talented professionals with a base salary and competitive compensation package, life, health, dental, pension plan, 401(k) and an exceptional working environment.

To explore this opportunity to join Harris N.A., visit our website and apply for position 42399 - www.harrisbank.com or e-mail resume to anneliese.cohen@hewitt.com.