

Position: Investment Associate / Trader

An outstanding opportunity exists to join a premier fee-only wealth management firm as an **Investment Associate** with the expectation of growing into an Investment Officer role after demonstrated performance. We are looking for a person in our **Phoenix office** with strong attention to detail who can multitask, prioritize diverse responsibilities, and take direction from multiple individuals while providing superior client service. The ideal candidate is willing to work in a fluid, growing company environment. Primary duties will consist of trading, reviewing client portfolios, writing investment policy statements and participating in investment research. Client relationship management will be added in the future. A bachelor's degree in financial planning, accounting, finance, business or economics is strongly preferred, but other degrees will be considered with appropriate experience. An ideal candidate will have knowledge of trading and investment management and a desire to obtain the Chartered Financial Analyst designation.

Employer Information

Keats, Connelly & Associates, Inc., www.keatsconnelly.com, is a wealth management firm with offices in Phoenix, Arizona and West Palm Beach, Florida. We specialize in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning through an integrated approach including: financial, investment, tax, estate and business planning, as well as the detailed management of our client's financial records and accounts. Our fee-only compensation model enables us to maintain our philosophy of promoting our clients' best interests at all times while avoiding any potential conflict of interest with commissions.

The firm is comprised of 4 shareholders and over 30 employees, with assets under management of over \$200 million.

Salary and benefits

Starting salary will be based upon experience and education. We offer benefits including a high deductible group health plan plus a dental package for which employee premiums are fully paid, coupled with a Health Reimbursement Arrangement (HRA). A flexible spending account for healthcare and dependent care expenses is also offered, as is short term disability, long term disability, a 401(k) plan, 18 days of paid time off, nine holidays, tuition assistance and other paid educational assistance, and opportunities to share in the profits of the company via a quarterly incentive payment.

If interested in this position, please email your resume to hr@keatsconnelly.com.