

SENIOR CLIENT ASSOCIATE

Summary:

Every firm has a culture – the values, beliefs, methodology, attitudes and standards that reflect an organization’s character. The truly inspiring firms – the game-changers, the industry leaders and the disruptors – have cultures that propel them to innovate and stand out. At MRA Associates, we aim to help people live fulfilled, prosperous lives by being one of those inspired firms.

Come grow with us! MRA Associates, a dynamic, comprehensive investment and wealth management firm, is seeking highly skilled individuals with the expertise to service the unique needs of high net worth individuals and families. We are one of Phoenix Business Journal’s top ranked independent investment advisers and one of CareerBuilder’s Top Companies to Work for in Arizona. Our team approach focuses on providing excellent client service in a well reputed, fast paced environment.

The Senior Client Associate is an exempt client relationship management position providing administrative and fiduciary support in the delivery of advice to clients. Within our team concept, the Senior Client Associate’s primary responsibility is to prepare financial modeling and financial advice documents under the guidance of more senior advisors, participate in client meetings, and complete follow-up work.

Qualifications:

- Bachelor’s degree in finance, accounting, tax or another related field
- 3-6 years’ experience in the financial services industry
- CFA, CFP; MTax; MBA; CPA; or other applicable certification preferred
- Series 65 required within first 120 days
- Proficiency in Word, Excel, PowerPoint, and Outlook
- Relevant exposure to CRM and financial services software
- Strong financial analytical and planning skills and work ethic
- Highly organized, detail-oriented and able to multitask
- Creative problem solver, self-starter and team player

Interested candidates should submit a resume and thoughtful cover letter to Brenda Bernardi, Director of Business Operations, at hr@mraassociates.com. A complete job description is available upon request.