CLIENT ASSOCIATE - INSTITUTIONAL

Company Summary:

MRA Associates, a dynamic, entrepreneurial investment and wealth management firm, is seeking highly skilled individuals with the expertise to service the unique needs of various institutions including foundations and endowments, and retirement plans. We are one of Phoenix Business Journal's top ranked independent investment advisers and one of the Top Companies to Work for in Arizona. Our team approach focuses on providing excellent client service in a well reputed, fast paced, results oriented environment.

Interested candidates should submit a resume and thoughtful cover letter to Brenda Bernardi, Director of Business Operations, at hr@miller-russell.com.

Summary:

The Client Associate is an exempt client relationship management position providing consulting, administrative, and fiduciary support to our clients. In addition, the Client Associate will be expected to participate in investment research and analysis, such as monitoring and due diligence of current and prospective investment strategies.

Duties and Responsibilities:

- Schedules and participates in meetings in a technical or support role; may serve as the primary client contact
- Corresponds with clients, prospects, attorneys, CPAs, and other vendors in a team environment, to implement services and manage client relationships
- Coordinates and participates in services required:
    - Portfolio management
    - Request for proposals
    - Quarterly reporting package preparation and delivery
    - Client and prospect presentations
- Performs and documents due diligence and monitoring of existing investment managers, including review of underlying portfolio investments, adherence to investment strategy and qualitative factors
- Develops tools, including credible, persuasive presentation materials and briefing memos on investment themes and research, to help team members communicate and present consistent messages to prospects and clients
- Articulates MRA's investment process, philosophy, and value proposition to clients and prospects and serves as a technical expert on MRA's investment deliverables
- Analyzes and resolves basic client issues using sound judgment based on experience
- Updates client files and records as appropriate
- Completes special projects individually or as a team leader
- Builds internal and external work relationships to enhance efficiency of the team

Qualifications:

- Bachelor's degree from an accredited university
- CFA candidate preferred
- 0-5 years' experience in the financial services industry
- Series 65 required within first 120 days
- Strong economic and financial analysis skills
- Ability to plan and organize with a high degree of creativity, innovation, and strategic thinking
- Precise, thorough, and detail oriented, reviewing extensive amount of data and information with accuracy
- Ability to earn respect and trust while dealing effectively at all levels of the organization
- Self-directed and quick to evaluate complex issues, identifying multiple options for resolution
- High personal ethics and integrity
- Strong work ethic, professional demeanor and client service focus
- Demonstrated commitment to community involvement and networking
- Excellent verbal and written communication skills
- Proficiency in Microsoft Office Suite; ability to gain proficiency in Salesforce and financial services software