



WEALTH MANAGEMENT INVESTMENT CONSULTING

Job Title: Analyst – Client Advisor Team

Location: Morristown, New Jersey

About Massey Quick Simon

Massey Quick was founded in 2004 to create a different kind of wealth management – one that suits its clients’ best interests as a fiduciary by seeking to align the firm’s goals with those of our clients and offer objective professional advice. On April of 2017, we underwent a merger with William E. Simon & Sons, our two firms have joined to form Massey Quick Simon and together we provide wealth management, investment consulting and family office services to high net worth individuals, families, endowments, foundations, and single family offices.

Why Work at Massey Quick Simon?

Massey Quick Simon’s culture and company philosophy are founded on a set of fundamental values that influence the choices we make and the actions we take. Our core values encompass integrity & honesty, mutual trust & respect, ownership & accountability, and humility. We provide opportunity, nurture talent, develop our people and reward achievement. You will be joining a culture that promotes functional excellence and teamwork, a passion for learning, and values employee input to help shape the future of the firm.

Duties & Responsibilities

The Analyst position supports one or more Client Advisors ensuring that all client needs are met. Examples of job duties include:

- Implement and supervise documentation for account opening, investments, money movement, and other account maintenance.
- Support and assist Client Advisors with the preparation of financial plans and investment analyses for clients and prospects.
- Interact with third party service providers (i.e. outside custodians, reporting providers, investment managers, and other advisors, such as CPAs and Attorneys).
- Interface with money managers regarding all investment activity.
- Monitor client liquidity needs and daily account activity reports and review monthly/quarterly client performance reports.
- Enter, track, and reconcile investment activity across our proprietary database, various custodians and our reporting provider.
- Prepare materials for client and prospect meetings.
- Participate in client meetings and phone conferences.
- Maintain client confidentiality and assist in identifying potentially fraudulent activity.

Attributes

- Foster a positive atmosphere within the office and with clients.
- Display team-oriented, collaborative spirit.

- Present professional behavior, appearance, and etiquette at all times.
- Demonstrate a desire to develop through continuing education including professional designations and participation in Massey Quick's in-house training sessions.
- Stay current and knowledgeable of changing industry initiatives and market conditions.
- Ability to work under multiple managers in a dynamic environment.
- Ability to work at a high level of independence.
- Passionate about the financial markets and financial planning.

Qualifications

- Bachelor's degree.
- 1-3 years of relevant professional financial services experience.
- Superior organizational, time management and written/oral communication skills.
- Process-driven and proactive with excellent problem solving and analytical skills.
- Excellent attention to detail and superior ability to focus.
- Agile ability to manage and prioritize multiple tasks while meeting deadlines.
- Expert level of proficiency with Microsoft Office, particularly Excel, Outlook, PowerPoint, and Word.
- Experience with DocuSign, Salesforce and eMoney preferred.

Salary & Benefits

Salary and bonus are competitive based on industry standards and experience level. Benefits include dental, vision, health care, and 401(k) with company match.

Financial support for professional accreditation and continuing education requirements. Transparent open door culture and friendly working environment.

Every employee is provided with a dedicated mentor and career path guidance.

Application Process

To apply, please submit a cover letter and resume to jobs@mqsadvisors.com and complete the online application at http://www.hrmcclaim.com/ho3/abw/job_redirect.asp?did=98&jid=108.



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