SIMON QUICK
ADVISORS

Job Title: Analyst Training Program
Location: Morristown, New Jersey

About Simon Quick Advisors

Simon Quick Advisors is a wealth management and investment consulting firm that advises high net worth individuals and families. Simon Quick Advisors is an independent registered investment advisor (RIA) offering customized integrated financial planning and investment solutions. The firm has offices in Morristown, NJ, New York, NY, and Los Angeles, CA, Chattanooga, TN and Denver, CO.

Why Work at Simon Quick Advisors?

Simon Quick Advisors' 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.

Program Description

Candidates will rotate through each of the firm's primary divisions – client service, investment research, and operations – over a six-month period shadowing member of the team and learning the day to day functions of each role. Upon completing the program, candidates will become a permanent member of the team in the division that best leverages their skill sets and suits the needs of the firm.

Duties & Responsibilities

Client Service

- Prepare materials for client and prospect meetings, enter detailed notes into CRM system, and monitor follow-up actions.
- Process documentation for account opening, investments, money movement, and other account maintenance, including interfacing with money managers and custodians as needed.
- Monitor client liquidity needs and daily account activity reports.
- Enter, track, and reconcile investment activity in internal proprietary database.
- Review monthly/quarterly client performance reports.

Investment Research

- Utilize proprietary research platform to facilitate ongoing qualitative and quantitative due diligence of various investment strategies.
- Regularly participate in manager due diligence meetings and take detailed notes.
- Prepare Investment Committee, Team and Strategy agendas, necessary supporting materials and attend sessions.
- Prepare and present topical macroeconomic presentation to the broader team.
- Monitor investment performance results on a monthly/quarterly basis.

Operations

- Liaise with client service team on operational and reporting matters.
- Oversee monthly and quarterly report production and distribution.
- Monitor new accounts and investments on portfolio management system.
- Support trading team with trade blotter reconciliation.
- Oversee filing of account statements.
- Assist team in billing preparation and calculations.

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.
- Ability to work under multiple managers in a dynamic environment.
- Ability to work at a high level of independence.

Qualifications

- Bachelor's degree.
- 0-2 years of relevant 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.

Salary & Benefits

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

To apply, please submit a cover letter and resume to jobs@simonquickadvisors.com and complete the online application at https://simonquickadvisors.com/our-firm/careers

Simon Quick Advisors, LLC is an Equal Opportunity Employer and we do not discriminate against any employee or applicant for employment because of race, color, sex, age, national origin, religion, sexual orientation, gender identity, status as a veteran, and basis of disability or any other federal, state or local protected class.