SCHECHTERWEALTH
KNOWLEDGE CREATES OPPORTUNITY℠

POWERED BY CRAIN CONTENT STUDIO DETROIT Cool PLACES TO WORK 2017

Join our Team!

Join our team of multi-disciplined professionals who help clients preserve, leverage and transfer their wealth. Recently named one of Crain's Cool Places to Work for in Metro Detroit…our core values create an incredible working environment that allows us to really live and deliver on those values.

OUR CORE VALUES

Clients' Needs First! • Create a complete "WOW" experience for clients and our staff!

A Special Place To Be! • Cutting Edge Knowledge – we strive to be the experts.

Click here to view the video

FINANCIAL SERVICES PROFESSIONAL

DESCRIPTION

The Financial Services Professional ("FSP") will have a strong passion for financial markets and a deep curiosity for seeking further investment knowledge. This role is designed to work closely with senior leadership on key firm clients and business growth initiatives. The FSP will develop in-depth expertise in complex financial products and transactions and will serve as a firm resource and expert to other advisors on financial markets, hedge funds, private equity, and insurance markets. In addition, there is ample opportunity to develop one's own book of business.

ESSENTIAL JOB FUNCTIONS

- Prepare meeting materials in conjunction with our research and marketing teams
- Conduct calls and due diligence on investment managers, traditional and alternative, and direct private equity investment opportunities
- Collaborate and build effective relationships with the Principals, Analysts, Advisors, and Vendors
- Continuously improve our external and internal deliverables, analysis methodologies, and operational processes
- Perform quantitative and qualitative financial analysis on potential investment opportunities
- Build national financial industry network to source deal flow
- Assist in ongoing review of service providers to the firm such as fund administrators, accounting, and legal professionals
- Analyze available financial technology solutions and assist in implementation and on boarding of such technologies
- Ability to quickly learn new subject matter in the financial field, including advanced life insurance strategies, and rapidly apply and explain complex financial concepts to our advisors to better prepare them in their sales efforts in support of our high net worth client wealth management needs
- Meet directly with high profile clients to discuss and pitch investment portfolios and opportunities and complex insurance transactions
- Opportunity to prospect and bring in your own clients

SKILLS / EXPERIENCE

- Bachelor's degree
- 2 years of related financial experience
- Series 7 and 65 – it is preferred you have these licenses already; however, if not, it is required one obtain such upon hire. The cost of licensing and fees will be reimbursed when successfully completed during the assigned timeframe
- Life and health insurance license – it is preferred you have these licenses already; however, if not, it is required one obtain such upon hire. The cost of licensing and fees will be reimbursed when successfully completed during the assigned timeframe
- Legal and/or Accounting background a plus
- CFA, CFP, and/or CPA a plus
- High-level proficiency in Microsoft Excel and Word
- Strong written and verbal communication skills; a persuasive and passionate communicator with excellent public speaking skills
- Robust intellectual curiosity to understand complex financial products and legal concepts
- Enthusiasm as the company's culture is based on meeting our clients' need and exceeding their expectations.

Please send your resume to careers@schechterwealth.com