

Director, Investment Advisory Services

RMG Associates is a leading national recruiting practice, serving financial services firms who work with Ultra-High-Net-Worth family clients. RMG Associates is the exclusive recruiter for this client who is a prestigious, nationally recognized Multi-Family Office; they are seeking a Director, Investment Advisory Services for their Seattle office. They are one of the most admired firms in the UHNW family investment industry and are especially renowned for their open architecture investment advisory. They are admired, exceptionally successful, and well-capitalized with a growing portfolio of UHNW client families and foundations.

Primary Responsibilities:

The Director, Investment Advisory Services is responsible for retaining, growing, and developing relationships in the ultra-affluent marketplace by delivering an investment advisory experience that exceeds client expectations. This broad responsibility encompasses the following activities:

- Defining client goals, objectives, risk tolerances, biases, and preferences
- Determining appropriate investment allocation to asset classes and strategies
- Developing investment policy
- Implementing investment policy through appropriate investment solutions
- Reporting and evaluating performance against policy
- Communicating and educating
- Introducing new ideas, strategies, and investment solutions
- Developing and executing on client service plans
- Lead and manage investment client service teams
- Coordinating and collaborating interdisciplinary wealth management team leaders and investment talent to maximize client value
- Contributing to new business development

Experience:

- The candidate will have a minimum of 10 years experience in a consultative investment role with demonstrated success in managing relationships with and delivering advice to ultra-affluent business leaders and/or large institutional investors.
- Investment advisory experience should include all aspects of the investment management process including objective setting, asset allocation and investment policy, manager/strategy search & selection, implementation, and on-going monitoring and evaluation delivered within a team-based approach.
- Experience in managing relationships with sophisticated and demanding individuals and/or fiduciaries with complex need
- Demonstrated experience in developing and contributing to business development

Skills/Attributes:

- Professional presence and credibility
- The candidate will have the ability to effect trust, confidence, and action through a unique set of interpersonal and communication skills
- Bachelors degree
- CFA designation and/or MBA

To apply for this position, please email your resume to Jeannie Hwang: jeannie@rmgassociates.com. Candidates who meet the above stated qualifications who would like to discuss the opportunity are invited to call Buzz Bray at RMG Associates at 206.402.3401 x229.

