

Consultant**ABOUT SYNTRINSIC**

Syntrinsic Investment Counsel partners as a fiduciary with nonprofit organizations and civically engaged private clients to develop, implement, and monitor customized investment portfolios. The firm advises on \$1.4 billion in assets across the health care, education, faith, human services, and cultural sectors.

Syntrinsic is a privately held, independent Registered Investment Adviser, nationally registered with the Securities and Exchange Commission. The firm is based in Denver, Colorado; its clientele is located around the country.

REQUIRED QUALITIES

This position requires a candidate with an entrepreneurial spirit who excels in a highly collaborative and innovative boutique work environment. Candidates with a demonstrated interest in continued personal and professional growth would best fit the firm's culture. Specifically, a strong candidate possesses the qualities below:

- Systematic thinker
- Organized
- Attentive to detail
- Articulate both orally and in writing
- Enjoys both predictability as well as solving problems as they arise
- High level of initiative
- Able to work well in a collaborative environment

EXPERIENCE WITH

- Consulting skills such as group facilitation, creative problem solving, teaching, and written and oral communication.
- Investment matters such as portfolio development, asset allocation theory, and understanding capital markets.
- Business development skills including relationship cultivation, proposal presentation, and closing new business.
- Nonprofit activity such as board or committee governance, programmatic volunteership, and/or work experience.

Consultant**RESPONSIBILITIES**

A Consultant is a critical part of the firm's Consulting Group by having the ultimate responsibility in carrying out the firm's client service model. These responsibilities are varied and include at least the following:

- Serve as primary relationship manager with Syntrinsic clients.
- Guide clients through the clarification of investment objectives and development of investment policies.
- Work with Syntrinsic's Investment Committee to develop appropriate investment portfolios for clients.
- Regularly meet with clients to review economic data and performance reports while addressing client concerns and educational needs.
- Interface with Syntrinsic's Client Service Team to ensure client operational needs are efficiently and effectively met.
- Collaborate with the other consultants to cultivate new client relationships
- Represent Syntrinsic in the broader community through client events, networking, and civic engagement.

REQUIRED QUALIFICATIONS

Candidates should have significant and relevant work experience. A Master's degree and/or industry designation (CFP, CIMA, AIF, etc.) is preferred.

COMPENSATION AND BENEFITS

Compensation and benefits will depend on several factors including previous experience. Benefits include medical, dental and vision benefits, as well as 401k match. Syntrinsic is committed to healthy work-life balance and allows for significant personal time. This position includes potential for advancement within the firm, though such advancement would be dependent on employee performance and the overall needs of the firm.

PROCESS

Interested candidates should forward a cover letter and resume to Alex Gordon, Chief Operating Officer at alex.gordon@syntrinsic.com.