

Associate 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

RESPONSIBILITIES

The Associate Consultant would support the firm's Consulting Group by managing the logistics involved in carrying out the client service model. These responsibilities are varied and include at least the following:

- Manage the day-to-day operational logistics for the firm's client.
 - Oversee the movement and investment of client assets.
 - Be responsible for the accurate custodial account opening and maintenance on behalf of the clients.
 - Create and run the periodic performance reports and other deliverables for clients.
 - Appropriately handle inbound inquiries from clients
- Manage client relationship-related scheduling and logistics
 - Interface with Consultants and clients to confirm meetings are on the schedule without conflicting times for the firm.
 - Ensure all materials and logistics for client meetings are correct and in order.
 - Proactively support client in meeting prep arrangements as well as post meeting follow up.



Career Opportunity

April 2018

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REQUIRED QUALIFICATIONS

Though experience within the financial services industry would be beneficial, consideration will be given to those outside the financial services industry who have demonstrated effective organization and administrative skills. Relevant work experience in a similar role is desired.

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.