

Portfolio Management Associate

Cobblestone Capital Advisors, LLC is a privately-owned, Rochester-based, SEC registered, investment advisor offering comprehensive investment advisory and wealth management services. The firm manages over \$1.9 billion in assets and has experienced steady growth since its founding in 1986.

Job Summary

We are adding an entry-level team member to our Investment Department. The Portfolio Management Associate will work closely with the Portfolio Management Team to learn the necessary skills to progress toward designing and executing asset allocation plans on behalf of our clients.

Duties and Responsibilities

- Exercise discretion and independent judgment in their daily tasks
- Participate in regular internal meetings regarding portfolio changes and market updates
- Learn financial software and technology used by the firm to perform primary job responsibilities including Tamarac, Salesforce and YCharts
- Provide trade desk support in execution of trades on behalf of our clients
- Provide trade desk support in implementing broad based investment decisions across client accounts
- Identify and recommend changes to daily processes to improve efficiency, documenting process and procedures for all areas under purview
- Develop industry knowledge pertinent to daily responsibilities
- Support investment committee with investment projects as needed
- Review client portfolios on a regular basis to assure compliance with stated investment plans
- Document investment plans for clients once approved by Portfolio Management Team
- Work in coordination with Portfolio Management Team to identify appropriate investment plans based on client specific variables: risk tolerance, cash flow needs, tax considerations, etc.

Qualifications

- Bachelor's Degree or greater from an accredited college or university
 - Finance, Accounting, or Business degree preferred
- Interest in working toward CFA, CFP, or similar designation
- Strong quantitative analytical skills
- Excellent computer skills, especially Microsoft Excel
- Ability to multitask and coordinate with various departments
- Strong analytical and detail-oriented aptitude; a high degree of accuracy is required
- 0-3 years of experience

Interested candidates must apply here:

https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&cclid=19000101_000001&jobId=351205&source=CC2&lang=en_US

No phone calls, please.

We are an Equal Opportunity Employer and our company's policies and practices relating to recruitment, employment, career development and advancement, promotion and retirement are based solely on merit, without regard to all legally protected classes, including but not limited to: race, color, sex, age, disability, religion, citizenship, national origin, ancestry, military status or veteran status, marital status, familial status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law.