Punch

A BOUTIQUE INVESTMENT ADVISORY

Wealth Strategies Group

Associate, Wealth Strategies Group

Employee Status: Full Time
Travel: No
Primary Location: Edina, Minnesota

Punch & Associates is a Minneapolis-based, independent wealth and investment management firm serving a select number of institutions and families of substantial wealth.

Description

Founded in 2002, Punch & Associates is a nationally recognized, independent wealth management boutique with a strong history of delivering exceptional investment performance, highly customized wealth planning, and intimate client service. Our risk-averse investment philosophy is centered on preserving and growing our clients' assets. Our team of seasoned professional advisors enables our clients to pursue their varied and rewarding life interests, both personal and professional. Our core values are:

1. Aiming past the target;
2. Having diligence and persistence in our work;
3. Displaying humility in our interactions;
4. Building the company for permanence; and
5. Maintaining a fun place to work.

Responsibilities:

- Support all aspects of client and prospect plan presentations, including ensuring that all research and data gathering is complete, and presentation materials are prepared in a timely fashion.
- Organize, prepare for, and participate in client meetings under supervision of senior advisors; assist in implementation of tailored financial strategies for high net worth individuals;
- Enthusiastically take ownership of ongoing financial planning goals and tasks and assist clients, external allied advisors, and internal wealth strategies and investment management teams in achieving desired outcomes.
- Learn and navigate firm's investment strategies; implement client investment portfolio recommendations within the philosophy and guidelines of the firm's management team.
- Coordinate the involvement of third party experts (attorneys, accountants, etc.) to support and execute client financial, tax, and estate planning strategies.
- Inspire client confidence through proactive communication, timely responses to client requests, and as a team member at client seminars and marketing events.

Qualifications:

- Philosophical alignment with Punch's investment and financial advising approach.
- Confident interest in working with clients and developing a long-term career in wealth management.
- Ability to operate in collaborative manner with clients and allied professionals; ability to work with other team members on multiple projects while consistently completing projects on time, efficiently, and with the highest quality.
- Excellent communication and organizational skills.
- Ability to think critically and creatively on a strategic level, taking initiative in problem-solving.
- Desire to build beneficial relationships in appropriate community, business, and professional organizations.

Education/Skills/Experience:

- Bachelor's degree in finance or business and related experience.
- Minimum of 2 years of wealth management and investment advisory experience required.

Interested candidates please email resume to info@punchinvest.com.