Punch

A BOUTIQUE INVESTMENT ADVISORY

Wealth Strategies Group

Director, 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:

- Organize, prepare for, and conduct meetings to guide clients through our financial planning process. Design tailored financial strategies for high net worth individuals that consider tax, estate, trust, insurance, cash flow, and investment issues, and recommend an asset allocation mix based on our firm's strategies and the client's underlying needs and risk tolerances.
- Expertly communicate firm's investment strategies. Define and implement client investment portfolios within the philosophy and guidelines of the firm's management team.
- Coordinate 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.
- Coordinate the involvement of third party experts (attorneys, accountants, etc.) to support and execute client financial, tax, and estate planning strategies.
- Advocate on behalf of Punch & Associates to create new client opportunities.
- Train supporting staff in client relationship management and financial advising.

Qualifications:

- Philosophical alignment with Punch's investment and financial advising approach.
- Proven ability to successfully manage complex high net worth clients in all aspects of wealth management.
- Proven ability to operate in collaborative manner with client's outside advisors.
- Excellent communication, organizational, and client relationship skills.
- Ability to work collaboratively with other team members on multiple projects while consistently completing projects on time, efficiently, and with the highest quality.
- Ability to think critically and creatively on a strategic level, taking initiative in problem-solving.
- Ability to build beneficial relationships in appropriate community, business, and professional organizations.
- Ability to develop employees and lead teams through regular coaching and feedback leading to positive results.
- Ability to comfortably maintain integrity and diplomacy amongst both client and firm personnel.

Education/Skills/Experience:

- Comprehensive knowledge of the financial services and investment industry.
- CPA or CFP designation required.
- Bachelor's degree in finance or business and related experience.
- Minimum of 8 years of wealth management and investment advisory experience required.
- Experience in a public accounting or professional services firm environment and income tax knowledge preferred.

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