Punch
A BOUTIQUE INVESTMENT ADVISORY

Advisor, Wealth Strategies Group
Punch & Associates Investment Management, Inc.

Punch & Associates is a Minneapolis-based, independent wealth and investment management firm serving a select number of institutions and families of substantial wealth. Our mission is to enable families and institutions to steward resources with clarity and purpose.

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 to:

1. Aim past the target;
2. Demonstrate diligence and persistence in our work;
3. Display humility in our interactions;
4. Build our company for permanence; and
5. Maintain a fun place to work.

Responsibilities Include, but are not limited to:

- Organize, prepare for, and conduct meetings to guide clients through our financial planning process. Design tailored financial strategies for high net worth individuals considering 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 with associate advisors 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 allied professionals (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.
- Mentor colleagues 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 collaborate with client's outside advisors and lead client team of professionals.
- 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 mentor employees and lead teams through regular coaching and feedback leading to positive results.
- Ability to model integrity, leadership, and diplomacy amongst clients and colleagues alike.

Education, Skills and Experience:

- Comprehensive knowledge of the financial services and investment industry.
- Bachelor's degree in finance or business or graduate degree in similar field and related experience.
- Professional designation CFP, CPA, and/or JD required.
- Minimum of 8 years of wealth management and investment advisory experience desired.

Punch & Associates offers a competitive salary, people-first culture, and generous benefits package. Please submit a cover letter and resume to resumes@punchinvest.com