

Saleeby & Associates
Job Posting

Investment Associate (Creve Coeur, MO)

A Financial Services firm located centrally in Creve Coeur, MO is looking for a full time Investment Associate to join our team.

Position Purpose:

To support the President/Owner in investment activities for clients daily. The principal/owner has 40+ years' industry experience and handles approximately \$340 million assets with four support staff.

Position responsibilities include but are not limited to:

- Execute investment transactions with a sense of urgency and high degree of accuracy.
- Provide excellent customer service to clients.
- Respond to inquiries from advisors and customers.
- Process new accounts, account updates, and transfer requests.
- Perform other related functions delegated or assigned.
- Work with minimal supervision and during stock market hours.

Compensation:

Salary ranges from \$55,000 to \$65,000+ commensurate with experience and credentials.
Eligible for monthly and periodic performance bonuses.

Position benefits:

- Benefit package includes paid days off, stock market holidays off, profit sharing, health reimbursement arrangement, and flexible work schedules.

Licenses/Certificates:

Securities license series 7/63 required
Clean FINRA U-4 (Uniform Application for Broker-Dealer Registration)

Knowledge/Experience:

- 2-4 years' experience in brokerage and client services
- A bachelor's degree in business/finance or related field preferred
- Must be self-motivated with the ability to execute time sensitive tasks effectively.
- Must effectively manage priorities, have strong interpersonal and math skills, and be well organized and adaptive.
- Experience with First Clearing firm or Thomson Reuter's trading platform preferred.
- Intermediate Microsoft Office (Word, Excel, Outlook) skills.

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