



## **ABOUT KNIGHTSBRIDGE WEALTH MANAGEMENT**

Knightsbridge Wealth Management is a Registered Investment Advisor (RIA) headquartered in Newport Beach, CA with \$800 million assets under management (AUM) and a 20-year history of helping clients achieve their financial goals. Our mission is to build a firm where we'd be happy to have our own family members be full-fee-paying clients, and we achieve this by living out our core values every day. These values include always doing what's best for the client, pursuing excellence in everything, treating each other well, and continuously adapting and improving.

## **OPERATIONS ANALYST JOB DESCRIPTION**

We're looking for a motivated, fast-learning, and high-performing addition to our team. Reporting to the Director of Trade Operations with guidance from the assigned Wealth Management Advisor, the position offers excellent exposure to executive leadership, multiple avenues for advancement at a growing firm, and the opportunity to be involved in portfolio management, business development, and operations.

### The right candidate will:

- Demonstrate proficiency working with numbers
- Exhibit attention to detail, organization, and time management
- Present a professional image compatible with serving high-net worth individuals whether in person, over the phone, or in writing
- Seek out the mentorship and development that comes with an in-office position
- Aspire to take on an increasing role within the Advisory team
- Be willing to step out of a narrowly defined role to help where the firm needs
- Embrace a dynamic, fast-paced environment with a problem-solving mindset

### Responsibilities

- Execute trades and rebalance accounts on behalf of clients
- Perform portfolio evaluations and prepare prospective client presentations
- Maintain investment strategy models
- Initiate and drive investment strategy performance reporting
- Perform ad-hoc research projects as directed by investment team
- Collaborate with operations team to streamline firm policies and procedures
- Take on other duties, as it's a small firm where people wear multiple hats

### Qualifications

- Undergraduate degree
- 2-4+ years of onsite work experience, with an investment market-related role preferred, though experience is less important than attitude and capacity to learn
- Proficiency with Excel and PowerPoint
- Familiarity with Tamarac, Charles Schwab, and Fidelity preferred



Benefits include:

- \$80,000-\$110,000 salary
- Performance-driven annual bonus
- 50% match of employee 401k contribution
- 100% coverage of employee health insurance
- Three weeks paid vacation that increases with tenure
- One firmwide work from home day per week with the remainder onsite
- A fun annual company retreat