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.

PORTFOLIO ANALYST JOB DESCRIPTION

We're looking for a motivated, fast-learning, and high-performing addition to our team. Reporting to the assigned Wealth Management Advisor with direction from the Director of Trade Operations, the position offers excellent exposure to executive leadership and multiple avenues for advancement at a growing firm.

<u>The right candidate will:</u>

- 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

<u>Responsibilities</u>

- Execute trades and rebalance accounts on behalf of clients
- Perform portfolio evaluations and prepare prospective client presentations
- Develop financial plans for clients
- Maintain investment strategy models
- Initiate and drive investment strategy performance reporting
- Perform ad-hoc projects as directed by the Wealth Advisor
- 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

<u>Qualifications</u>

- 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

450 Newport Center Dr. Suite 630, Newport Beach, CA 92660 | 949-644-4444 | knightsbridge@knightsb.com | www.knightsb.com