Sellwood
CONSULTING LLC

INVESTMENT CONSULTING ASSOCIATE

Sellwood Consulting LLC ("Sellwood") is seeking an Associate to join our expanding investment team. The ideal candidate will be an integral member of our client teams working to meet the investment needs of our clients - endowments, foundations, retirement plans, and private wealth assets.

Who You'll Work With
Sellwood is the Northwest's premier independent, employee-owned investment advisory firm. Located in Portland, Oregon, Sellwood provides tailored investment solutions to sophisticated institutional clients.

The Job
The Associate is the person responsible for the internal management of all client and project deliverables: identifying required deliverables, executing them, and making sure that they are complete, correct, and delivered on time. This includes overseeing Analyst work to ensure that Analyst deliverables are client-ready when delivered to the Consultant or client. The Associate works directly with Consultants to understand each client's unique circumstances to best support the client and internal team.

What You'll Do

- Coordination and completion of client deliverables, which commonly include investment policy statements, asset allocation studies, manager structure analyses, manager search documents, performance reports, portfolio transitions, and other client-specific projects.
- Project management of various long-term investment or client-related projects.
- Assist Consultants with client service, as necessary.
- Research on investment managers, including in-person meetings and due diligence reports.
- Attend client meetings with Consultants and present various analyses and recommendations.
- Other investment-related research projects.

What You'll Bring
Associate candidates should have a minimum of 3 years of investment experience, preferably in investment consulting or a related field. A Bachelor's degree is required. Candidates who demonstrate a progression towards achieving professional and/or graduate level education are preferred (i.e. a Chartered Financial Analyst® (CFA®) designation and/or Business Master's degree).

We are looking for candidates that have a demonstrated interest in and knowledge of investments combined with strong project management, quantitative, analytical, written, and verbal skills. A successful candidate must be proactive, a team player, think critically and independently, provide quality analysis, and able to thrive in a fluid work environment. Some travel may be required.

What We Offer

- *Competitive pay and benefits* – Including company 401k contributions, discretionary bonuses, potential profit-sharing, health/vision insurance plans with company HSA contributions, and generous paid time off.
- *Meaningful work and mission* – You will help bring our clients' goals to fruition; what sets us apart is that we do it with a rare independence that allows us to put clients first—always.
- *Direct access to firm principals* – Our size allows for firm wide collaboration and regular exposure to our leaders.
- *Respect for (and flexibility that allows for) work/life balance* – And—while you're working in the office—a genuinely collegial, collaborative office culture.
- *Opportunities for growth, both personal and professional* – We encourage professional development and internal advancement. We actively support our employees' community volunteerism, as well as mental and physical health activities.

To Apply

Interested candidates should submit their cover letter with salary expectations and résumé via email to **associatejob@sellwoodconsulting.com**. Only those candidates whose qualifications meet our requirements will be contacted.

No phone calls, faxes, or temporary agencies please.

Sellwood supports workforce diversity and is an Equal Employment Opportunity Employer.