BOND&DEVICK
wealth partners

Position: Investment Associate

Bond&Devick Wealth Partners is seeking an individual who aspires to work in a fast-paced, team-oriented environment where integrity and respect for our clients and each other is of utmost importance.

Bond&Devick Wealth Partners Overview

Value in Values—committed to what you care about™

At Bond&Devick we sincerely care about our clients and their family. We aim to alleviate our clients' financial stress so they can focus on what makes them happy. Since our firm's establishment in 1982, we are proud to have the opportunity to help so many clients plan for and reach their dreams.

We are unique in that we use Goals-Based Financial Planning, to measure progress towards your goals, driven by your values. We believe our clients' investments should be aligned with what is important to them.

We strive to be a leader in our industry by putting our clients, our team, and our community above all else. In 2015 we became the only financial planning firm in Minnesota to earn a BCorp Certification. It is a continuous governing process that monitors and validates that we "walk the talk".

Bond&Devick Wealth Partners Core Values

The Cornerstones of Bond&Devick Wealth Partners

- Client-driven: We deliver superior client service using our value in values, goal-based financial planning platform
- Team-oriented: We support and treat team members with respect
- Our Impact: We strive to make a difference by being a leader in SRI investing, volunteering, charitable giving, our BCorp certification, and being a PRI signatory

Bond&Devick Wealth Partners Employee Value Proposition

- Culture – positive, rewarding, values driven
- Work – meaningful and rewarding
- Team – supportive
- Growth – individual (training and development) and organizational (career potential)
- Life – work/life balance
- Benefits – monetary and non-monetary

Client Responsibilities

- Create, implement, rebalance, and monitor client portfolios to ensure they stay within investment policy guidelines
- Client and firm model portfolio strategic asset allocation, security selection, and 100% accurate trade execution
- Maintain internal portfolios models
- Generate portfolio analysis to review with clients and team
- Respond to client questions and provide market insights

Team Responsibilities

- Work with Wealth Management and Operation Teams
- Support Advisors
- Maintain internal compliance reporting working with firm's CCO
- Prepare for and facilitate Investment Committee meetings

Firm Responsibilities

- Understand and support the firm's vision, mission, and strategy
- Understand and support firm's core values and value propositions
- Maintain Investment research lists and performance tracking
- Maintain fund company contact relationships and utilize tools

Growth Opportunities

- CFA® certification
- Potential for growth is aligned with firm growth and individual goals

Skills Required

- 1-2 years portfolio management and trading experience (3-5 years preferred)
- Exceptional communication (written and verbal)
- Excellent technology aptitude
- Focus on attention to detail
- Client experience oriented
- Sustainable investing research knowledge and experience preferred

Skills Being Developed

- Knowledge of the financial planning process
- Knowledge of planning areas including financial planning, investments, budgeting, taxes, risk management and estate planning
- Relationship management – Investment Companies
- Client service and experience
- Working with Team
- Create insights and communication for economic and market analysis
- Effective communication both verbal and written

Technology

- Proficient in Microsoft Office (Word, PowerPoint, Outlook – Expert level for Excel)
- Knowledge of custodial platform (Schwab), portfolio management and reporting (Black Diamond), investment research (Morningstar), and CRM (Redtail)

Education

Bachelor's Degree required
CFA® designation Level 1 minimum

Compensation

- Total compensation based on experience and education

Benefits

- 401k Retirement Plan Match
- Quarterly Employee Incentive Profit Sharing
- Group Health and Dental, HSA, FSA
- Group life, long-term disability, AD&D insurances
- Paid Time Off: 120 hours/weeks per year for first 4 years
- 12 days plus up to 6 half days paid holidays
- Work-Life Flextime
- Charitable match
- Wellness, Sustainability, and Technology reimbursement programs
- Paid professional memberships, conferences, and training
- 2-week Sabbatical after 5 years of service

Hours

- Full-time: Monday-Thursday 8am-4pm, Friday 8am-3pm

Other

- 90-day orientation period
- Non-solicit contract

For more information about our firm, visit our website at www.bondanddevick.com. Please email your cover letter and resume to Kristine Bisanz at kris@bondanddevick.com.