



RELATIONSHIP MANAGER ASSOCIATE

Carolinan Investment Consulting, LLC in Charlotte, NC seeks a Relationship Manager Associate to perform the following jobs duties: Working under supervision of Financial Consultant, and in support of Relationship Manager, provide wealth management services to clients. Maintain current knowledge of the clients' accounts and ongoing service needs. Assist in opening client accounts and on-boarding new clients. Prepare performance reports and brief Financial Consultant or Relationship Manager for client meetings. Prepare appropriate paperwork and execute client transactions or requests (e.g., money movement, trading, etc.). Assist clients with required minimum distributions and gifting. Monitor annuities for maturity or exchange and monitor other outside investments as applicable. Assist clients with realized gain/loss figures and year-end tax reporting information. Serve as a liaison to the client's CPA and attorney for tax, estate, and other planning purposes. Help develop and produce new client proposals.

Bachelor's degree preferred. Must have a Series 65 license and/or Series 7 & 66. Must have at least one year experience working with Microsoft Office (Word, Excel, Power Point, Outlook) through coursework or work experience. University-level studies must demonstrate coursework in the following areas: Financial and Investment Analysis, Economics, Statistics, Risk Analysis and Management, Accounting, and Communications (or Marketing).

The annual salary for this position is \$55,000. Persons interested in this position should contact Jeanne Kelsey Fritchley at 5605 Carnegie Blvd. Suite 400, Charlotte, NC 28209, or careers@carolinasinvest.com.