OSBORNE PARTNERS
Capital Management, LLC

Job Description – Portfolio Counselor

Portfolio Counselors are the client relationship managers at Osborne Partners, providing investment guidance and advice through phone conversations, email and face to face meetings. They learn about clients' financial circumstances through direct interaction and then work with our Portfolio Managers in the creation of portfolio recommendations based on each client's particular needs. Portfolio Counselors are assigned existing and new high net worth clients – no prospecting or cold calling – with the goal of building long-term relationships. Their objective is to gain a complete understanding of each client's investment needs and to make sure their Osborne Partners portfolio is consistently appropriate. Portfolio Counselors reach out to clients proactively, explaining the firm's current economic outlook, educating clients on our investment philosophy, and addressing any questions or needs raised by clients. Additionally, Portfolio Counselors work to grow their books through additions and referrals from existing clients.

The CERTIFIED FINANCIAL PLANNER™ designation is strongly preferred for this position. Osborne Partners offers financial plan analysis to existing clients, with the goals being to assess and display the current financial situation and to also forecast possible future scenarios based on malleable assumptions. The Portfolio Counselor will work with the client to gather all pertinent information, develop an extensive report to clearly present that data, and then explain to the client what conclusions the various forecasts reach and how changes in the variables might alter those results.

Qualifications include, but are not limited to:

- 7+ years of investment industry experience
- CERTIFIED FINANCIAL PLANNER™ designation preferred
- Strong knowledge of finance and capital markets
- 4-year college degree with a preferred emphasis in economics, business, finance, accounting or similar field
- Ability to multi-task
- Strong time management skills
- Dynamic communication skills
- Articulate and charismatic with a highly professional work ethic

Responsibilities include, but are not limited to:

- Acting as the main point of contact for the firm's clients
- Conducting regular portfolio reviews with our clients
- Working with our clients and Portfolio Managers to create appropriate asset allocations
- Creating financial plans for our clients through in-depth discussions
- Act as liaison between our clients, Portfolio Managers and Client Service Specialists
- Introducing our clients to our Wealth Center application, which offers holistic financial views

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OPCM offers a strong compensation and benefits package. Compensation includes competitive salary and a discretionary bonus. Benefits include medical, dental, and vision, along with 401K matching and a stock options plan.

To be considered for this position your resume must be accompanied by a cover letter summarizing your experience and why your background would be a good fit for the position. Please submit all documents including salary requirements to careers@osbornepartners.com.

Thank you for understanding that no phone calls will be taken for this position.

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