

STACK FINANCIAL MANAGEMENT



625 Wisconsin Avenue ♦ Whitefish, Montana 59937 ♦ 1-800-790-5001 ♦ www.StackFinancialManagement.com

Client Portfolio Advisor

Stack Financial Management is offering a challenging and rewarding career opportunity for the right candidate to join our dynamic team. This position requires a professional who is committed to exceptional client service and enjoys a fast-paced, energetic work environment. The Client Portfolio Advisor will work with clients and prospective clients, while interfacing closely with both operations and portfolio management team members. The duties of this position include actively participating in day-to-day portfolio administration, reporting, and investment activities. We look forward to adding another investment professional to our team who will be a part of the continued success of both our firm, and our clients, for years to come.

Responsibilities:

- Communicate directly with current and prospective clients on an ongoing basis
- Analyze portfolios and perform tax-sensitive portfolio transition planning for prospects and onboarding clients
- Assist in the preparation and execution of large block trades and periodic account rebalancing
- Prepare portfolio reviews and other materials for client consultations
- Contribute to team decisions on portfolio strategy
- Collaborate with the team in writing for both formal and informal firm reports and publications
- Participate in business development, firm presentations, and special events

Qualifications:

- Exceptional written and oral communication skills
- Prior work experience in a high-net-worth client environment
- Bachelor's degree required and 5+ years of relevant experience preferred
- Has passed or is willing to complete the FINRA Series 65 Uniform Investment Advisor Law Examination
- Holds or is actively pursuing CFP, CIMA, or CPWA designation

If you are a self-motivated team player, eager to contribute your expertise and ideas to our organization, while enjoying the desirable quality of life offered in Whitefish, Montana, we invite you to send a cover letter and resume to:

Stack Financial Management
625 Wisconsin Avenue
Whitefish, MT 59937
careers@stackfinancialmanagement.com

*- Non-smoking environment -
All inquiries will remain confidential*