10610 South Jordan Gateway | Suite 210
South Jordan, UT 84095
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Toll Free 888 643.8434
www.integratedfinancialgroup.com

INVESTMENT OPERATIONS POSITION

At Integrated Financial Group, LLC we are looking for ambitious individuals to join our elite team.

Integrated Financial Group is a boutique financial planning firm and multi-family office. We exclusively serve successful business owners and high net worth individuals and families. We are not a high-volume shop, and each client receives a very personalized experience. Our founding partners have an average of 23 years of experience in comprehensive financial planning and have been ranked top in the state by Forbes Magazine.

We seek to inspire and empower our clients and staff to strive for their best possible life. Our team helps clients better understand their best financial options, create a well-thought-out strategy, and then be proactive to implement their ideal plan. Using a tailored approach to evaluate, education, and inform clients of their best choices in the areas of investments, business succession, comprehensive financial planning, insurance products, retirement planning we work with clients to address their financial needs and concerns.

As a member of the IFG team, you will be instrumental in helping us continue to educate our clients and provide exceptional service. If you are looking to work with some of the best and want to go places, this is the right position for you.

JOB RESPONSIBILITIES

- Attention to detail
- Opening accounts, ACAT transfers, wires, lines of credit.
- Investment tracking from application through to completion
- Process, track advisor planning and client service requests
- Keep a detailed cash report using IFG systems
- Help maintain and update proprietary reports and client databases
- Prepare analysis and generate proposals for client meetings
- Understand and become proficient in Albridge and Morning Star account aggregation software
- Maintain the organization of all physical and electronic files
- Prepare investment reviews and asset allocation sheets
- Track investment transaction history
- Use Microsoft Word, Excel, and PowerPoint

PREFERENCES

- Organized, detailed and diligent
- Securities license - Series 7 or 2 years' experience in the financial services industry, preferably in personal comprehensive financial planning
- Self-motivated in a fast-paced work environment
- High-performing team player - our team is cohesive and professional
- Effective communicator - strong writing skills as well as presentation skills

BENEFITS

In addition to our unique culture, we also offer the following perks and benefits:

- Pay range depending on experience and background $44,000 to $52,000
- NEW building on 106th South Jordan Park Way, UT in May 2019!
- Benchmark incentives and opportunities
- Profit sharing
- Paid NYSE holidays off work + additional PTO
- Simple IRA plan match up to 3%
- Office closes at 12:00 pm every Friday
- Health Insurance re-imbursement after 60-day probation period
- Flexibility if the job is getting done

To Apply: email Casey Kotter at casey@ifgteam.com and/or Tyler Ehninger at tyler@ifgteam.com