Sentinel Trust
Together, families prosper℠

www.sentineltrust.com

Senior Client Investment Advisor

About

Full-time | Houston, Texas

Job Description:

As a Sr. Client Investment Advisor, you will report to the President of the Firm and serve as the primary point of contact for an existing book of ultra-high net-worth clients on all investment-related matters, including:

- Designing and implementing sophisticated investment and asset allocation strategies.
- Counseling clients in a fee-based fiduciary capacity with regard to strategic and tactical investment advice and performance.
- Developing and delivering portfolio reviews.
- Responding to client-initiated questions and leading investment discussions at scheduled client meetings.
- Adapting to changing situations and resolving challenging issues calmly and effectively
- Working in a collaborative team environment as a front-line advisor.
- Representing the Firm in the financial community and with centers of influence.
- Opportunities to participate in business development, as desired.
- Maintain a sensitivity towards our clients' need for confidentiality.

Skills that would be an asset to this position include:

- Well-developed critical thinking, deductive reasoning, and problem-solving skills.
- An affinity for researching unique questions, often of a legal or financial nature.
- Polished written and oral communication skills.
- Effective project management skills and ability to manage multiple priorities and cross-functional teams.
- People management and influencing experience.

 | T 713.529.3729 | info@sentineltrust.com

- An aptitude for working collaboratively and efficiently with a wide range of external stakeholders, professional service providers, and vendors.
- Self-motivation with a strong sense of accountability.

Desired qualifications to apply for this position:

- Bachelor's degree and 10+ years' experience
- CFA designation required.
- Acceptable results on background tests.

Company Description:

At Sentinel Trust, it is our honor to serve a diverse group of affluent families, helping them enhance their legacies through their unique personal, business, and philanthropic goals.

We help families of wealth succeed and simplify: Our deeply personal level of service is based on knowing our clients' hopes, expectations, challenges, and goals. With our personal touch, we become a true extension of the family, delivering the exceptional level of service that our clients expect and deserve.

We focus only on very high net-worth families: These families have distinctive needs and complex challenges that cannot be served as well by firms that lack our singular dedication.

We listen first: We know that every family is unique. Each of our Senior Officers serves only a small number of clients to ensure each family gets ample personal attention.

We don't sell products or provide one-size-fits-all solutions: There is no fixed menu of investment and lifestyle services. Instead, our team of dedicated professionals leverage years of experience and multi-disciplinary expertise to build your family customized solutions. Our philosophy is to provide individualized investment management and financial guidance to all generations—whenever and however they are needed.

Above all, we are a family. Our hallmark is not only to serve our clients with excellence, but to provide for each other and our greater community.

Please send your resume to HumanResources@sentineltrust.com to apply.