



Investment Consulting Coordinator

Are you the ultimate ball juggler with a laser eye for details? Are you interested in a career in investment research and analytics? If so, Francis Investment Counsel wants to talk with you! We are seeking a behind the scenes rock star to get things done for the clients we serve.

Francis Investment Counsel is an employee-owned Registered Investment Advisor with offices in Brookfield, Wisconsin and Minneapolis, MN. Companies hire us to design, build, and operate the best retirement plans possible and to help their employees do money better. With decades of experience as an ERISA fiduciary, we deliver investment consulting services to large and mid-sized employers and holistic financial education and personal financial advice to their employees. Our firm is unapologetically straightforward – no conflicts, clearly fixed fees, and a sole focus on connecting the people we serve directly to the expert advice they need.

What we don't do is equally important. We don't sell mutual funds, so our investment consulting services are truly independent and conflict-free. We don't sell wealth management services, so employees receive trusted advice without hidden sales agendas.

Our ideal candidate is a master multi-tasker and hard worker. They get things done under tight deadlines and derive great satisfaction from helping others.

Here's what you'll do:

1. Ensure that client projects get done well and on time
2. Get involved in the investment manager talent search process
3. Manage the creation of a key deliverable, the Annual Fiduciary Review
4. Deepen our client relationships by serving as contact point person
5. Prepare investment consulting reports and compile research for clients
6. Provide professional, friendly service for all client and participant inquiries

Your qualifications should include: a bachelor's degree from a four-year college or university preferably with focus on business coursework. The ability to professionally communicate verbally and in writing is a must. You should be proficient with Microsoft Office applications and have an aptitude and willingness to learn investment analytics and financial planning principles. Experience in the financial services industry is a bonus. Extra credit is earned if you have experience in utilizing Morningstar Direct, PSN, and StyleAdvisor.

Plan on spending most of your time in the office with an occasional visit to client sites. Yes, there may be a need to put in some additional hours during crunch time.

This is a unique opportunity to join the Francis team as a full-time salaried coworker with many promotional opportunities. You'll enjoy a generous benefit package including paid sabbaticals, and a collaborative and drama-free work environment.

Application

Send resume to Susan Salmon, Director of Operations at susan.salmon@francisinvco.com.

The above statement reflects the general details necessary to perform the principal functions of the position described and shall not be construed as a detailed description of all the work requirements that may be inherent during your employment.

Job Description for Investment Consulting Services Coordinator