Denver Investments

Job Title: Portfolio Administrator/Administrative Support, Wealth Management

Purpose and Responsibilities

- Supports portfolio management team with client-related activities and apprise portfolio managers of issues relating to the accounts.
- Works in conjunction with the Wealth Management Team to develop and communicate best practices for department administration, procedures and standards.
- Assist the portfolio management team to provide coverage and to manage workflow on an as-needed basis, including ad hoc projects.
- Provide client service, prepare detailed investment reports and respond to regular requests for portfolio-related information.
- Prepares marketing presentations for client meetings.
- Opens and invests new accounts, prepares and ensures accurate trade orders.
- Confirms the accuracy and completeness of transactions, performance and data for accounts, including reviewing accounts for discrepancies or irregularities.
- Liaison with various departments including marketing, compliance, trading, A/R and accounting.
- Maintains client files and posts accurate information in client databases.

Qualifications

- A strong mathematical aptitude, accuracy and attention to detail are required.
- Knowledge of financial markets and investment terminology necessary.
- Proficient in Microsoft Office, including Excel, Word, PowerPoint and Outlook.
- Relevant training and work experience is desired. A college degree or work experience equivalent to a four-year degree is preferred.
- A strong work ethic and good organizational skills, with the ability to multi-task is necessary.
- Individual must be a team player with effective interpersonal, written and verbal communication skills.

Apply

To apply candidates should send resume and cover letter to:

Mail: Denver Investments
1225 17th Street, 26th floor
Denver, CO 80202

Email: dwalker@denvest.com

About Denver Investments

Denver Investments is a research-driven organization founded on the belief that original fundamental research is the key driver of value-added management. Since the inception of our investment management services in 1958, proprietary fundamental research has been the cornerstone of our investment approach. Today, the firm manages assets for a broad array of individual and institutional investors, and is 100% employee-owned. We believe the firm’s organizational independence helps align our interests with those of our clients which enhances our ability to promote their investment success.