



## SENIOR INVESTMENT ASSOCIATE

**Bermuda Investment Advisory Services Limited (BIAS)**, a full service Investment Management and Advisory group with companies in Bermuda and Cayman, is seeking an individual to join a team of energetic and committed professionals as **Senior Investment Associate**.

This position calls for an experienced and ethical individual capable of building relationships and growing the current client base through referral generation and new client acquisition. The successful candidate must hold a professional designation indicating an ability to provide investment advice in group seminars or one-on-one meetings.

### Responsibilities and Duties include:-

#### **Business Development:**

- Nurture relationships with existing clients that would promote the natural referral of associates, friends and family members.
- Engage in all activities which are designed to facilitate the accumulation of assets by identifying, attracting and converting prospects into clients.
- Assist in the preparation of proposals for prospective clients.
- Manage and conduct client seminars and other asset-gathering initiatives on a regular basis.
- Improve and create a series of investment presentations.

#### **Client Services:**

- Proactively handle client inquiries and requests as well as address investment related questions.
- Provide periodic reports for existing investment advisory and pension clients.
- Document client instructions in BIAS' proprietary management system and monitor client accounts to ensure records are accurate and that funds are available for the purchase of securities.
- Develop and maintain a prospect database and assist in researching asset-gathering opportunities.
- Ability to supervise and provide training to Investment Interns as needed.

### Educational and Work Requirements Include:-

- A Bachelor's Degree preferably in Economics, Finance or Business with a CFA Level 2 pass.
- Strong interpersonal skills as well as proven ability to gather investor assets.
- Ability to use relevant PC and other investment related technology.
- Strong written and verbal communication skills are essential.
- Proficiency with Microsoft Excel, Word, and PowerPoint.
- Ability to work with minimal supervision and willingness to work extended hours in peak periods.
- Experience in creating and presenting investment advisory seminars.
- Good client management skills.

If you are looking for a rewarding and challenging career, please submit a detailed resume to:

Human Resources, Bermuda Investment Advisory Services Limited  
Wessex House, First Floor, 45 Reid Street, Hamilton, HM12, Bermuda  
Or by fax to 1-441-292-7292; or email: [hrrecruiting@bias.bm](mailto:hrrecruiting@bias.bm)

Closing Date: May 18, 2012

BIAS is an equal opportunity employer

Licensed to conduct investment business by the Bermuda Monetary Authority