



Let's build your future together!

621 7<sup>th</sup> Avenue, Beaver Falls, PA 15010  
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724-384-8758

## **Trading Associate – Full Time**

Jumet Financial is committed to providing our clients with well-informed, objective advice, and to create a disciplined framework within which financial decisions are made, implemented, and managed from generation to generation. Jumet Financial is seeking a highly efficient and detail-oriented individual with the same strong standards for the role of Trading Associate with the potential to grow into a Senior Trading Specialist. The position requires a high level of confidentiality and professionalism, excellent time and project management skills, and the ability to manage multiple work streams (both internal and external) at once. The qualified candidate must show high regard for client needs and not only be efficient, but also build rapport with current clients and prospective clients. The individual will have a desire to continue their education and skill development toward managing and building a Trading Team.

### **Primary Duties and Responsibilities:**

- Place and review trades across all accounts
- Review and maintain cash levels in clients' accounts
- Assist investment committee in ongoing research of mutual fund line up
- Assist in research and implementation of new trading tools for the company
- Annual review of the current investments in clients' accounts and future investment options
- Rebalance accounts to ensure the ongoing appropriateness of the allocation and to react to market volatility
- Deliver outstanding client service, relating to general client support and answering general questions about accounts
- Participate in team meetings and support staff meetings – in particular, the Investment team meeting
- Aid in the growth and development of Jumet Financial as a whole
- Other assigned duties from management
- Assist individual advisors with creation and maintenance of client portfolios
- All Jumet Financial employees are required to help serve our community through initiatives planned by the Jumet Financial Team

### **Qualifications:**

- Associates or bachelor's degree in progress or in a finance related field and willingness to continue education towards certifications and/or advanced degrees
- Willingness to obtain the Series 7 & 66 and other required registrations promptly to become an advisor
- Strong passion to work in and succeed in the financial industry
- Willingness to obtain various securities and insurance registrations (upon request)
- Excellent Computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent communication skills (spelling, grammar and proofreading) written skills and verbal skills
- Excellent organizational and time management skills
- Ability to prioritize and multi-task
- Ability to exercise confidentiality and discretion

Eligible candidates will be required to pass a thorough background check.

All qualified candidates should email resumes to [careers@jumetfinancial.com](mailto:careers@jumetfinancial.com)