ALBOURNE

The Company:

Albourne is an industry leading investment consultant with offices around the globe. Our firm of 450+ employees provides advisory services to investors, including institutional investors, financial intermediaries and family offices, on over $550 billion of alternative investments across the liquidity spectrum. We specialize in Hedge Funds, Private Equity, Real Assets, Real Estate and Dynamic Beta.

Albourne empowers its clients by providing Portfolio Advice, Research (Investment, Operational and Quantitative due diligence), Analytics (data and tools) and Implementation (middle and back office) services. We are committed to non-discretionary advice, fixed fee pricing and independence.

Albourne strives to be a sustainable company with three main goals: 1) Aspiring to be a multi-generational firm with broad internal ownership and a Partnership structure; 2) Treating our employees and clients fairly; and 3) Advocating for positive change for its benefit and for the alternative investment industry – best practices have always been a defining part of who we are.

The Role:

The Client Account Manager role sits within the Portfolio Group. This Function is the conduit through which Albourne provides investment advice to its clients and interacts with them on a daily basis. Client Account Manager act as the liaison between Albourne and its clients while supporting those who advise sophisticated investors regarding complex investments in alternative asset classes.

Accountabilities:

- Act as the daily liaison between the clients and Albourne to ensure the delivery of advisory services
- Gain in depth knowledge of the client's interests and needs to be able to identify cross selling opportunities in coordination with the Cross-Selling and Marketing Teams
- Partner with Portfolio Analysts to prepare portfolio, strategy, and fund level research for clients; this may include summarizing salient points from Albourne research pieces and preparing quantitative analysis (performance, risk, etc) as requested by clients
- Proactively review and highlight new Albourne research to clients based on their current and/or potential portfolio(s)
- Responsible for monthly feedback regarding client interactions and satisfaction
- Become fluent in Albourne industry initiatives to independently explain our positions, garner feedback and liaise with the appropriate Albourne representative to implement any change
- Manage new client account set up and provide training of Albourne's systems and tools to assigned clients through online and in person demonstrations
- Monitor and maintain client due diligence requests, budgets, and client preferences
- Arrange for and participate in regular conference calls and face to face meetings between clients and Albourne analysts or external Investment Managers
- Ensure client deliverables are prepared, reviewed and presented to clients in a timely and accurate manner, to meet deadlines imposed by management and clients. If circumstances hinder the ability to meet a deadline, effectively and proactively communicate this with management and clients Ensure the internal database and knowledge management system are maintained with up to date information on the clients
- Actively participate in the planning and execution of Albourne Events as requested. Participate in the promotion and registration of all Client events

- Report potential conflicts to and work with compliance to ensure appropriate disclosures appear on research reports
- Actively participate in the planning and execution of Albourne Events as requested. Participate in the promotion and registration of all Client events

Desired Qualifications:

- Bachelor's Degree preferred, or equivalent combination of education, training, and experience.
- Strong literacy in Microsoft Office
- Proactive self-starter and proficient in time management & multi-tasking skills
- Professional demeanour and strong interpersonal skills
  Abide by the Client Group policies and procedures as well as the Albourne Group's policies and procedures including but not limited to IFFM; compliance reporting; HFDB filing; Information, Communications & Cyber Security Policy; Expense & Travel Policy, etc.
- Attendance at annual company events as requested
- Adherence to the Compliance Manual and other Albourne Policies and procedures

Benefits & Perks:

- Comprehensive Compensation and Benefits Package
- Fully paid Medical and Dental PPO
- Fully paid Basic Life and AD&D
- 401k & FSA
- Everyday Wellness, onsite weekly yoga/stretch sessions*** (Virtual due to COVID)
- 30 days paid time off each year including Vacation and Holidays
- Biennial company offsite

Job Type: Full-time

Location: Norwalk, CT & San Francisco, CA

Work authorization: Must be eligible to work in the United States

Albourne America LLC is an Equal Opportunity Employer. It is the policy of the company to provide equal opportunity for all employees and applicants for employment without regard to race, color, religion, sex, pregnancy, sexual orientation, national origin, ancestry, gender identity, physical or mental disability, age, medical condition, veteran or marital status, or any other characteristic protected by federal, state or local laws. Albourne America LLC will consider for employment qualified applicants with criminal histories in a manner consistent with the requirements of the San Francisco's Fair Chance Ordinance.

Please click here to view Albourne America's privacy policy.