

Job Description: Investment Advisor

NorthStar Asset Management, Inc. Boston, MA seeks an exceptional Investment Advisor to join its diverse team of professionals.

About NorthStar Asset Management

Founded in 1990, NorthStar Asset Management specializes exclusively in socially responsible investing for high net-worth clients and non-profit organizations. NorthStar's mission is to provide integrative and effective portfolio management by connecting social concerns to security selection, asset allocation, and activism. NorthStar's investment management process begins with an analysis of the social, ecological, and political problems of our time, spanning but not limited to race, gender, income inequality, environmental justice, and human rights, and includes in-depth conversations with clients. These steps result in the construction of highly personalized portfolios that integrate financial goals while upholding a commitment to social change and environmental sustainability. Synthesizing a broad market outlook and the individual needs of the client, NorthStar combines direct investments in global equities, investment grade bonds, alternative "outside" investments, and cash to create vibrant and well-balanced portfolios.

NorthStar's activism includes engagement with portfolio companies to improve their behavior with regards to race and gender, wealth and income inequality, human rights, environmental justice, and corporate governance. Our selection of Outside Investments and our strict criteria in selecting funding opportunities enhance our client's commitment to justice and equity. The NorthStar approach, vision, and philosophy have evolved based on a core belief that we are here to make a difference.

For more information on NorthStar Asset Management, please visit [here](#).

The Opportunity

The ideal Investment Advisor will bring a client-driven approach, outstanding relationship development skills, and strong experience working with clients to synthesize their interests, values, and financial needs into carefully constructed investment portfolios. The successful Investment Advisor will also be adept at coordinating internal and external teamwork to address and advise clients on philanthropy, estate planning, taxes, and other matters that inevitably arise.

Candidate Profile

Strong Client Relationship Manager

- Ability to meet a broad range of clients' needs, including financial planning and decision making, philanthropic activities, and experience navigating complex family dynamics.
- Strong commitment to and experience in social justice with a desire to advocate for policies and programs that support the mission of NorthStar Asset Management.

- Exceptional ability to recognize, communicate, and translate client passion and financial needs.
- Willing to assure the integrity and growth of the NorthStar identity, including the development and execution of external communication efforts.
- Eager to embrace the role of advisor to existing NorthStar clients as well as enthusiastic about cultivating new client relationships.

Effective Leader and Team Member

- Promote and advance a positive and collaborative culture within the organization with an action-oriented commitment to diversity, equity, and inclusion.
- Establish trust with leadership, staff, and external partners of NorthStar Asset Management.
- Support a strong leadership team to ensure a continued high-performance response across the organization.
- Be flexible, personable, and brave complemented by a courageous communication style.
- Be an active, attentive, and understanding listener.
- Contribute new ideas to NorthStar's approach to activism and investing.
- Model a strong work ethic with ongoing curiosity and humility.
- Have a healthy sense of humor.
- Be trustworthy.

Strong candidates will offer:

- Minimum of 5 years of experience in the investment advising arena and/or portfolio management with a track record in client service.
- MBA, CFA, CFP, Master's Degree and/or equivalent work experience.
- Background working with high net-worth individuals and non-profit organizations and the ability to meet a broad range of family and client needs.
- Successful track record and passion for translating a client's interests, values, and financial needs into the creation of a values aligned portfolio.
- A willingness to learn the NorthStar Asset Management approach and philosophy to responsible investing.
- Highly skilled communicator with an ability to synthesize and explain complex ideas concisely.
- Proven financial overview and client need assimilation skills.
- Ability to manage client communication and ambiguity patiently and effectively.
- Astute, confident, and welcoming personality.

Equal Opportunity

NorthStar is strongly committed to diversity and inclusion. NorthStar provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, gender, gender identity, sexual orientation, national origin, age, disability, or genetics. The NorthStar workplace is an environment that is welcoming and inclusive for everyone. NorthStar encourages women and people of color to apply.

How to Apply

NorthStar Asset Management, Inc. is a socially responsible investment firm in Boston, MA. For more information about us, please visit northstarasset.com.

To apply, please email your resume and cover letter to jobs@northstarasset.com with Investment Advisor in the subject line. No phone calls, please.