Balentine

Balentine LLC, is an independently owned Registered Investment Advisor with a history of over 25 years of experience providing unconflicted advice to wealthy individuals and their families, endowments and foundations. Based in Atlanta, Georgia, with an office in Raleigh, North Carolina, Balentine is an employee-owned firm serving the wealth management needs of a sophisticated group of clients. At present, Balentine is comprised of approximately 30 individuals collectively working on an asset base of over $2.3 BB with significant growth potential beyond its present foundation for clientele with liquid assets in excess of $5MM.

The firm has been at the forefront of the move toward fee-based rather than transaction-based advisory services as well as a proponent of open architecture investment solutions across all asset classes on a fully discretionary basis. There is a deeply rooted belief that this approach is the only way to provide completely objective and unbiased investment advice. The firm's independence - combined with the fact that its partners and employees have substantial personal assets invested with the same managers and on the same terms as clients - provides stability and the proper alignment of interests. A holistic approach to each client's total balance sheet is taken so that investments may be tailored to achieve the appropriate risk-adjusted return.

Since its original founding as Balentine & Co. in 1987, integrity, exceptional client service, and investment excellence have been hallmarks of the firm. These principles were carried forward when the firm became part of Wilmington Trust in 2002, and remain the foundation for the firm re-established in 2010 and once again independent Balentine LLC, which brings together a cohesive team of professionals with years of previous experience working together. The firm is actively seeking to grow its business and recruit like-minded professionals to assist in its expansion.

Associate Relationship Manager

Balentine is currently looking for an individual to serve as an Associate Relationship Manager (ARM) in its Raleigh, North Carolina office to assist in business development, investment management and relationship management for its clientele. Specifically, this will entail working directly with the Relationship Managers of the Raleigh office to facilitate business development and relationship management efforts in a collaborative manner. This professional will play a key role in closing new business and working with existing clients of the firm and will have the full resources of the firm at their disposal in that effort, including a centralized marketing department, relationship management teams members and the Investment Strategy Team as well.

The selected should be highly professional and completely dedicated to providing a first class experience to both existing and prospective clients. This individual will have a good deal of direct responsibility and will need to be able to maintain and cultivate strong networks with various functional teams within the firm and in the existing/prospective client spheres of influence as well. An analytical and inquisitive mindset is a must.

Outcomes

The overarching goal of the ARM is to assume comprehensive management of the tactical, day-to-day needs of the Raleigh office thereby allowing the RMs to focus on client acquisition and strategical needs of the office and its employees. Specific duties can be broken down into four groups and will include the following responsibilities.

Client Prospecting and Onboarding

- Demonstrate an in-depth knowledge of Balentine's historical and current philosophies and marketing strategies by completing first draft responses to Requests for Proposals (RFP's) at least one week before due; schedule and run follow-up meetings with RMs to finalize RFP response, and meeting all associated deadlines
- Present to the RM weekly business lead ideas, progress, as well as customized pitching plans for known opportunities
- Ensure seamless transfer of complex investments by responding to Transition Specialist requests within a 24-hour period including coordinating responses from the RM as required

Client Management

- Demonstrate in-depth knowledge of Balentine’s custodian and reporting systems by compiling accurate research as needed, meeting all communicated deadlines
- Provide complete and error-free analyses of client’s return attribution profile
- Maintain, without error, tracking sheet analysis, client cash-needs summaries, and internal client reporting summaries
- Respond to client requests in both collaborative and independent fashions and within Balentine’s standard 24-hour period.
- Serve as the liaison between the RM and the Client Service Associate by responding to all questions related to the daily management of clients including rebalance coordination and cash flow management.
- Demonstrate in-depth knowledge of Balentine’s CRM software
- Adhere to both Balentine and regulatory reporting requirements
- Format and brand all external documents consistent with current Balentine conventions

Financial Planning

- Efficiently collect data from clients and input into financial planning software, requesting and updating changes on an agreed upon schedule and as provided by clients
- Input RM-instructed changes to the financial planning software and updated as requested
- Prepare all financial planning reports for client review meetings; materials should be reviewed for accuracy and completeness prior to delivery to the RM
- Demonstrate knowledge of basic financial planning concepts in tax, estate, insurance, retirement and investment realms by scheduling and running “pre-brief” meetings prior to all client meetings to ensure the RM is prepared for the client

Portfolio Management

- Within the first month, meet with existing team to review and update Client Profiles
- Follow established client monitoring protocol of those Client profiles to ensure accurate information is readily available
- Demonstrate an in-depth knowledge of Balentine’s investment strategies and model mechanics by making complete and thorough recommendations for existing client portfolios proactively based on on-going monitoring as well as reactively as requested by the RMs

- Serve as the liaison between the Raleigh Office and Balentine's IST by participating in all investment related discussions, acquiring responses from the IST to all investment-related questions with regards to Raleigh's clients and prospects

Competencies

Balentine is an innovative and entrepreneurial organization that functions as a single team dedicated to outstanding client service and investment excellence. Successful candidates will embody that spirit and philosophy. In additional to strong professional experience, the ideal candidate will have the following personal characteristics:

- **Passion**
    - *Demonstrable enthusiasm towards both the investment industry and Balentine*
    - *Entrepreneurial zeal with a strong business sense*
- **Integrity**
    - *Unquestioned commitment to doing what is right*
    - *Ability to work with confidential financial information with unquestioned discretion*
- **Productive and Efficient**
    - *Ability to self-manage, prioritize, and produce high-quality results in both team and individual environment*
    - *Comfort level working in a non-bureaucratic environment*
    - *Proactive attitude complemented by a high energy level*
- **High Standard / Attention to Detail**
    - *Having pride in your work the work of your team*
    - *Treating every project diligently*
    - *Extreme attention to detail as evidenced by a lack of errors, omissions, and inconsistencies*
- **Communication Skills**
    - *Demonstrating polished and professional communication and presentation styles across a number of mediums*
    - *An ability to listen effectively and interpret internal and external needs*
- **Flexible**
    - *Ability to work alone, in teams, and with clients*
    - *Being unperturbed by changing conditions and priorities*

Qualifications

The successful candidate will likely have previously demonstrated experience in the field of investment management. The individual should be comfortable working for an entrepreneurial organization with a successful track record of delivering consistent long-term investment returns in a high-performing culture. Specifically, he/she should have a representation of the following qualifications:

- Understanding of a broad range of investment products, including those of a more complex nature in alternative and private capital asset classes
- Some combination of M.B.A. degree or CFA®/CFP® designation required
- Undergraduate business degree desired
- Ability to support business development, account maintenance, and administrative issues
- MS Office proficient and self -sufficient
- Desired competence in additional web and cloud based reporting and infrastructure systems
- Understanding of performance attribution and accounting
- Account transition knowledge and monitoring

Compensation

A competitive compensation package will be offered including an attractive base salary, an incentive compensation plan, and benefits. If interested, please send a cover letter and resume to CEasterlin@Balentine.com.