



## **Trust Company of the South**

### *Investment Associate Job Description*

A Trust Company of the South Investment Associate will be based in Greensboro and will provide support to Trust Company's Chief Investment Officer and Trust Company's Wealth Advisors in our Greensboro, Raleigh, and Charlotte offices.

A successful candidate is someone who has a passion for helping people realize successful financial outcomes. This candidate will have an interest in the investment aspect of financial planning and desire to gain the experience necessary to grow in his or her career. This position will provide a candidate the opportunity to provide direct value to our clients and team. This candidate will have the ability to prioritize multiple tasks on a daily basis and work effectively in a team environment.

Please visit [www.tcts.com](http://www.tcts.com) for more information about our firm.

#### **Select Investment Associate Responsibilities Include:**

- **Portfolio Management:**
  - Contribute to successful management of client portfolios.
  - Oversee routine trading, serve as lead on advanced trading, and monitor/invest, as needed, excess cash positions within client accounts.
  - Construct and maintain asset allocation reports and investigate variances from determined asset allocation.
  - Support Wealth Advisory team through relevant investment research, various client specific analyses, and tax efficient trading.
  - Maintain firm's proprietary trading tools and proper security classifications in firm's trust accounting software.
  
- **Performance & Reporting:**
  - Serve as point person for firm's performance reporting software systems (Greenhill and PerformanceIQ). Duties include mapping securities, managing account groups and user logins, and troubleshooting variances.
  - Track valuations, capital calls, and distributions for alternative investments as well as calculating and confirm performance calculations.
  - Prepare periodic internal performance reports.
  - Update/build customized reports for clients.
  - Gather data and populate third-party consultant databases.
  - Investigate and explain variances in investment performance results.

#### **Required Investment Associate Soft Skills Include:**

- **Integrity:** Demonstrates honest, ethical behavior in all interactions.
- **Respect:** Cooperative, considerate, and tactful when dealing with others.
- **Excellence:** Demonstrates enthusiasm and pride in work he or she performs.

- Team: Demonstrates a positive attitude toward company goals and initiatives. Puts interests of clients and team ahead of his or her own interests.
- Gets it done: Accomplishes responsibilities in an efficient, timely manner, without further prompting.

**Qualifications:**

- Bachelor's Degree (required).
- Minimum of 3-5 years of demonstrated industry experience required.
- Chartered Financial Analyst designation and / or Certified Financial Planner® designation (preferred), or currently working towards.
- Proficiency with Microsoft Office suite.
- Trustworthy professional who is both respectful and respected.
- Genuine interest in serving and caring for other people.
- Superior communicator and team player.
- Great listener.
- Strong analytical and technical skills.
- Highly organized.
- Extreme attention to detail and ability to prioritize multiple tasks.
- Motivated hard worker who displays self-confidence and a desire to learn.

**Application Instructions:**

All qualified candidates, please send your resume to [akfuller@tcts.com](mailto:akfuller@tcts.com).