Job Title: Client Portfolio & Wealth Advisor
Location: Tampa, FL
Company: Suncoast Equity Management LLC

About Us:
Suncoast Equity Management (SEM) is a respected registered investment advisory firm committed to helping clients achieve their financial goals through tailored portfolio management, strategic investment planning, and personalized service. SEM specializes in equity and municipal fixed-income management for high-net-worth individuals and institutional clients, providing consistent, disciplined investment strategies.

Position Overview:
We are seeking a motivated Client Portfolio & Wealth Advisor to join our team of Prosperity Advisors. The role would have a unique dual focus, balancing investment management and client advisory responsibilities. This role offers an opportunity for growth in a collaborative and dynamic environment.

Key Responsibilities:

Assist in managing client portfolios, including asset allocation, rebalancing, and trade execution.

- **Portfolio Management and Support:**
  - Assist in developing and implementing investment strategies aligned with client goals and market conditions.
  - Manage cash and maturing securities and work with the portfolio management team for reinvestment.
  - Monitor and report portfolio performance for both internal teams and clients.
  - Stay updated on financial markets, industry trends, and regulatory changes.

- **Client & Advisor Collaboration:**
  - Work closely with Advisors, providing insights and supporting portfolio customization.
  - Maintain client relationships by responding to inquiries and providing professional support.
  - Meet with clients and prospects as needed.

- **Client Relationship Management:**
  - Serve as the primary contact for a designated client base.
  - Develop and maintain relationships, understanding client needs, and proactively addressing inquiries and needs.
  - Provide clients with personalized financial guidance.
  - Conduct regular client meetings, offering performance updates, fostering trust, and delivering exceptional client service.

Qualifications:

- Minimum 5 years of wealth management experience (other or additional experience will be considered)
- 1-3 years of experience in investment management, financial analysis, or related roles within a registered investment advisory firm.
- CFA, CFP®, ChFC®, or PFS designation preferred. Bachelor's degree (B.A.) in Finance, Economics, or a related field.
- Valid FINRA Series 65 license (may be obtained within 120-days as a condition of employment)
- Strong analytical, organizational, and problem-solving skills.
- Effective communication skills, both written and verbal.
- Proficiency in Microsoft Excel, Word, PowerPoint, and investment research tools.
- Ability to manage multiple tasks in a fast-paced environment and work well both independently and within a team.

Application Process:
Interested candidates are encouraged to submit a resume and cover letter outlining their qualifications and interest in the position. We thank all applicants for their interest, but only those selected for an interview will be contacted.

This position is based in Tampa, FL, and is not eligible for a relocation package.

Submit application package to careers@suncoastequity.com