

One of the Nation's top financial services teams, located in Rochester, NY is actively seeking an experienced analyst to fulfill the role of Chief Investment Officer and Portfolio Strategist. The team manages over \$700 million in assets for ultra high net worth individuals and families.

The Chief Investment Officer and Portfolio Strategist will be responsible for leading the team in investment policy, making investment recommendations, and developing an ongoing investment strategy for the group's clients.

Requirements:

BA in Finance, Accounting or related discipline, advanced degree (MBA) a Plus

Minimum 3-5 years experience in capital markets analysis, investment portfolio management and client management

CFA, CPA and/or previous experience as a financial advisor is a plus.
Series 7 and other licenses are also considered a plus.

Optimal candidate will possess experience in trust, tax, and estate planning

A great opportunity for a motivated, experienced professional!

For Consideration:

Please send your resume with cover letter to theschoffgroup@citi.com

To learn more about our team please visit:
<http://fc.smithbarney.com/schoffgroupsb/>