



Title: Operations, Marketing, and Client Service Associate

Organization: Chase Investment Counsel Corporation

Application Deadline: Open until filled

Hours: 25-30 hours/week, ideally 10am – 4pm with an hour for lunch

Position Summary:

The Operations, Marketing, and Client Service Associate reports to the CEO and serves on the operations and administration team. This position plays an integral role in the firm's investment operations, marketing, family office administration, and client service activities related to client account administration. Primary responsibilities include interfacing with the investment team to manage investment strategy models, proxy voting for client portfolios, communicating new stock purchases to clients, communicating realized gains and losses to clients, assisting with the firm's marketing activities, and assisting with the administration of family office activities including trading activities for family office accounts. Additional responsibilities include internal mail delivery, fixed income trading, and client service activities related to assisting clients with money movements and other administrative requests.

We seek a highly efficient, versatile, and dedicated team player who will effectively support our internal investment team and current client base and be part of the continued growth of the firm. The successful candidate should expect to:

- Communicate exceptionally in both oral and written communications with both internal and external audiences.
- Learn all aspects of the firm's investment operations and marketing and contribute to the regular assessment of the effectiveness of the process and enhancements to improve marketing outcomes.
- Serve our clients' administrative needs promptly and professionally.

Skills and Attributes:

The successful candidate must be eager to support our team in serving a long-standing client base as well as engaging new prospects. Interested candidates must demonstrate excellent communications skills, attention to detail, versatility, ability to learn quickly, interest in regular and repeatable processes/routines, and strong people skills.

- Must be willing to report to work in our Charlottesville, Virginia office.
- Basic experience in banking, investments, accounting, or the financial field a plus.
- Interest in working with numbers encouraged.
- Prior customer service experience is welcomed.
- Academic: Bachelor's degree preferred.

Organizational chemistry and fit are of the utmost importance to us and will be determined during the interview process. In addition, the applicant for this position must be willing to undergo a Key Trait assessment to help determine organizational fit.

Compensation and Benefits:

Compensation may range from \$32,500 - \$46,800 dependent on background, prior experience, and scheduled work hours. Benefits available. The position offers long term advancement opportunities in the operations/compliance area of the company.

Chase Investment Counsel Corporation is a SEC-registered investment advisory firm based in Charlottesville, VA. The firm manages over \$400 million in primarily long-only separately-managed portfolios including its all-cap mutual fund. For more information about Chase Investment Counsel Corporation please refer to the firm's website www.chaseinv.com.

Qualified candidates who wish to be considered should send a personal letter indicating why this position is of interest to them along with their salary requirements, and a resume to jenniferking@chaseinv.com.