HALL CAPITAL
PARTNERS LLC

Title: Analyst (Entry Level), Client Services Group
Location: San Francisco
Email: sf_analyst@hallcapital.com

Firm Overview

Hall Capital Partners is a privately owned registered investment advisor that builds and manages multi-asset class global investment portfolios for individuals, families, and institutions. We direct more than $22 billion in investment assets for our advisory clients and pooled vehicle investors. Founded in 1994, our 120+ employees operate from offices in San Francisco and New York. We are typically responsible for investment strategy, asset allocation, and portfolio construction for a globally diversified investment portfolio. For many clients, we also contribute significantly to other aspects of financial strategy, such as managing and diversifying concentrated public stock positions, wealth transfer and philanthropic strategies, and similar matters. We also manage a platform of pooled vehicles. Our culture is centered on integrity, client focus, performance, and understanding our fiduciary responsibilities.

Job Description

The Client Services group is seeking bright, motivated professionals to join our team. Client Services Analysts report directly to the Director of Client Services.

The position offers an opportunity to develop investment experience, build knowledge of a wide range of asset classes, and apply best investment practices in an intellectual, collegial environment. Specific responsibilities include:

1. Produce quarterly client reports that incorporate performance analysis, balance sheets, and cash flow statements
2. Track and analyze performance data
3. Assist in managing client transactions including stock sales, wire transfers, charitable gifts, and investment funding
4. Communicate with tax advisors and investment managers to assist in gathering tax data
5. Special projects, as needed, which can include recruiting, research liaison, systems processes and automation.

Job Qualifications

The ideal candidate should have an excellent work ethic, as well as strong organizational and communication skills

- Four year Bachelor’s degree with a GPA greater than 3.0
- 0-2 years of work experience
- Basic knowledge of financial markets
- Keen interest in investment management and client services
- Strong written and oral communication and interpersonal skills
- Ability to multi-task and balance priorities while maintaining a high level of attention to detail
- Ability to handle pressure and work in a fast-paced, deadline driven environment
- Desire to work in a collegial team environment
- Proficiency in Microsoft Excel and Word is required
- Knowledge of Advent / Axys and Bloomberg is helpful
- Job tasks are performed at the Company office, and require use of computer network and telephone system