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Opportunities at Shepherd Financial Partners
February 2018

Senior Portfolio Analyst

The *Senior Portfolio Analyst* works closely with the *Portfolio Analyst* to provide broad investment management direction and support to *Advisors*. Shepherd Financial Partners (SFP) is committed to a centrally managed investment offering to design and manage a series of client portfolios. This includes oversight and management of existing portfolios under the governance of the investment committee, development of additional/complimentary portfolios or investment services, providing in-depth research and knowledge in support of advisors work with clients, and continuously improving the investment and risk management processes.
5-10 years of experience in the financial services industry with experience in global asset allocation. Advanced certification (CFA®, CIMA, etc.) required.

Client Relationship Manager

The *Client Relationship Manager (CRM)* works closely with the *Advisor* and other team members to ensure a superior client experience. This includes being responsible for the client onboarding process and supporting documentation to successfully establish investment accounts or a financial plan and prepare for the ongoing relationship. The CRM collaborates with the advisor to prepare for and follow-up from client meetings and respond to periodic client requests in order to effectively maintain and grow the ongoing relationship. The *Client Relationship Manager* and *Advisor* function as a team to provide high levels of client satisfaction to meet or exceed agreed-to service standards and ensure client loyalty.

Paraplanner

The *Paraplanner* works closely with the *Advisor* and other team members to ensure a superior client experience during the financial planning process. *The Paraplanner* is responsible for the data gathering, analysis, preparation and delivery of a financial plan. The *Paraplanner* collaborates with the advisor to prepare for client meetings and to present the Financial Plan. *The Paraplanner* will assist the Advisor in making recommendations to the client. The *Paraplanner* and *Advisor* function as a team to provide high levels of client satisfaction to exceed agreed-to service standards and ensure client loyalty.