



Position Description

Title: **Trader**
Reports to: Andy Popenfoose – Chief Investment Officer
Benefits: Yes
Status: Exempt

The Company

SYM Financial Advisors is searching for a responsible, energetic and detail-oriented candidate to serve our clients as part of a team. Since 1968, SYM Financial Advisors, a private, employee-owned, independent financial advisory firm, has remained dedicated to a client-centric philosophy of devoting the extra time, resources and energy to uniquely know each client and their goals. Rooted in traditional values, SYM Financial Advisors serves as a trusted expert, using our team's deep knowledge and vast experiences to be an advocate for our clients and help them achieve their vision of financial success.

Job Summary

Responsibilities of the Trader include conducting ongoing trading and monitoring activities of the firm. The ideal candidate will be self-motivated, possess exceptional problem solving and analytical skills and have a keen eye for detail. In addition, this person will assist in the development, implementation, and evaluation of best-practice policies and procedures with the intention of increasing efficiency and accuracy of trading activities while ensuring compliance with industry guidelines and regulations.

Duties and Responsibilities

- Execute the trade process including fulfilling firm-wide daily trading requests and related activities
- Complete trading activities while ensuring accuracy within the firm's trade management system
- Consult with Lead Trader to ensure best execution on non-standard trades requiring special handling
- Investigate, research, and correct issues related to trading activities (escalate issues as needed)
- Collaborate with Lead Trader and Investment Team to improve trading strategies
- Complete all training to stay abreast of requirements for the financial industry
- Deliver high-quality customer service to clients, analysts, advisors, and client support representatives by sharing expertise on trade-related topics

Qualifications

- Bachelor's degree from accredited college
- Excellent organizational, analytical, listening, written, and verbal communication skills
- Proficiency in Microsoft Word, Excel, PowerPoint and Outlook. Experience in Microsoft CRM and / or the Tamarac suite of products a plus
- Ability to collaborate in a professional and constructive manner while promoting teamwork
- Desire and ability to achieve excellence on a small collegial team
- Professional curiosity and desire to learn and develop at an industry-leading firm
- Exhibits teamwork, remaining adaptable as daily needs fluctuate: quick to offer and seek help when appropriate

Salary and Benefits

Pay / benefits are competitive based on industry standards.

- Pay will be based on experience. Performance reviewed 90 days from date of hire. Thereafter, performance is informally reviewed each calendar quarter and formally reviewed at year end.
- Incentive compensation
- Benefits include paid time off, health care, 401(k), life and long-term disability insurance
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

Working Environment

This position requires an average of 40+ hours per week to perform. Consistent attendance is required. Because of frequent contact with clients, appropriate manner, conduct, and grooming needed. The working environment is smoke-free.

In the past two years SYM has won recognition as one of the country's best-run advisory firms as well as one of the best places to work.