# Investment Trading Associate (Series 7 Required)

Overland Park, KS · Full-time · **$70k–90k**

**Investment Trading Associate (Series 7 Required)**
**Location: Overland Park, KS**
**Salary: $70,000 - $90,000+ (DOE) + Quarterly Bonus Opportunities**
**Benefits: Health Insurance w/ HAS Contributions, 401(k) w/match, PTO, Parental Leave, Professional Development + More!**
**Job Type: Full-Time | On-site**
**Typical Hours: Monday – Friday, 40 hours/week**
**Start Date: ASAP**
**Sponsorship is not available**
**Relocation assistance negotiable**

**Investment Trading Associate Description**

Our client in financial services is looking for an Investment Trading Associate to join their team in Overland Park, KS. In this role, you will support the investment team through portfolio trading, account rebalancing, investment operations, and portfolio analysis. You'll work directly with the Chief Investment Officer and experienced investment professionals to ensure client portfolios align with established strategies and investment objectives. Our client is looking for someone with an active Series 7 license, a minimum of an associate's degree, and experience working with investment products and portfolio operations. To succeed, you must be analytical, detail-oriented, and comfortable managing accuracy-sensitive transactions while independently solving problems. This is a great opportunity to join an established, growing firm that offers exposure to a variety of investment strategies, a collaborative team environment, and long-term opportunities to expand your investment expertise.

**Investment Trading Associate Responsibilities**

- Execute investment trades and rebalance client portfolios
- Manage portfolio cash needs, including deposits and distributions
- Maintain portfolio allocations according to established investment models
- Review trades for accuracy, restrictions, and tax considerations
- Identify portfolio exceptions and resolve account discrepancies
- Prepare investment reports, portfolio comparisons, and analyses
- Support investment model updates and portfolio strategy implementation
- Coordinate with investment, operations, and compliance teams
- Monitor market activity and contribute to investment team discussions

**Investment Trading Associate Qualifications**

- Associate's degree or higher required
- Active FINRA Series 7 license required
- Experience in investment operations, trading, or portfolio management required

- Proficiency with Microsoft Excel required
- Strong analytical, problem-solving, and critical-thinking skills required
- Excellent attention to detail and organizational skills required

**Apply:** https://twonice.hire.trakstar.com/jobs/fk0zlkx/?apply=true

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