



JOB DESCRIPTION

JOB TITLE: Investment Executive

LOCATION: Burlington, MA (Corp HQ)

DEPARTMENT: Sales

REPORTS TO: CEO

COMPANY:

Tritower Financial Group, LLC (“Tritower”) is a private real estate investment firm based in Burlington, MA whose investment strategy focuses on acquiring stable, income-generating assets with an emphasis on office, industrial and multi-family properties located in Tier I & II cities nationally. Our objective is to provide favorable risk-adjusted returns through the acquisition of stable assets that deliver consistent, predictable dividends for our valued investors. We primarily service individual, family office, trust and institutional clientele.

Tritower is currently seeking seasoned broker/financial executives with experience in marketing sophisticated financial products to high net worth individuals, family offices, investment advisors, banks & institutional investors.

JOB SUMMARY:

To be an integral part of the Sales Department in a very competitive sales environment with the ability to work independently or with other team members. Must be flexible, detailed oriented, highly organized and professional with the ability to multi-task and work under pressure.

PRINCIPAL DUTIES:

Make sales calls to qualified individuals.

File and maintain client documents.

Gather, organize and prepare marketing material and manage periodic mailings.

Prospecting and contacting qualified individuals, understand their financial needs, gauge their level of investment interest, schedule appointments or send marketing material.

Process sales orders – speak to investors to gather personal, financial information and prepare all necessary investment documents.

Flexible with work schedule, extra hours may be required.

Ability to travel out of state for property site visits or client appointments.

Manage your clients and provide timely response to their questions and requests.

Comply with Company policies, procedures and compliance rules and regulations.

Must be able to become well-versed with NASD and FINRA rules and regulations.

Other tasks as assigned.



JOB QUALIFICATIONS:

Computer skills required (Microsoft Word, Microsoft Excel)
Must have excellent written and verbal communication skills
FINRA Securities Licensing will be required
FINRA Series 7 License (preferred)
Bachelor's Degree (preferred)

CONTACT us at:

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This job description is intended to describe the general nature and level of the work being performed by employees in the position. It is not intended to be a complete list of all responsibilities, duties, and skills for the position. The Company reserves the right at all times, in its sole discretion, to add or subtract duties and responsibilities, as it deems necessary.