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UHNW & INSTITUTIONAL INVESTMENT ADVISOR | ROCHESTER, NY | HYBRID

Ultra-High-Net-Worth Families, Endowments, Foundations & Nonprofits

40% Relationship Development & Growth • 40% Advisory & Client Leadership
10% Investment Expertise & Development • 10% Leadership & Firm Development

Position Overview

LVW Advisors is seeking an exceptional senior advisor and leader who can build trust with sophisticated clients, exercise sound judgment in complex situations, and contribute meaningfully to the firm's continued growth.

The role offers a path to broader leadership responsibilities as LVW develops its next generation of leaders. We are seeking someone with strong investment acumen, executive presence, emotional intelligence, intellectual curiosity, and a desire to continuously learn and expand their capabilities. This is a senior, outward-facing role that blends investment expertise, client advisory, relationship management, and business development. The successful candidate will deepen existing relationships, cultivate new opportunities, and help clients navigate complex investment decisions.

The position is primarily focused on serving sophisticated families, business owners, and other ultra-high-net-worth clients, while also supporting select institutional relationships, including endowments, foundations, and nonprofits. This role centers on applying LVW's investment expertise to help clients make informed decisions, build lasting relationships, and create new opportunities for growth. **This is not a portfolio management, primary research, or administrative position.**

Key Responsibilities

Relationship Development & Business Growth - 40%

- Develop and cultivate a pipeline of institutional and UHNW prospects through direct outreach, professional networks, centers of influence, board relationships, community involvement and firm-sponsored activities.
- Proactively create meetings and opportunities rather than relying solely on inbound referrals.
- Partner with senior advisors to advance prospect opportunities through cultivation, presentations, follow-up and successful conversion to client relationships.
- Build relationships with key professional influencers while effectively communicating LVW's investment philosophy, capabilities and independent advisory approach.
- Partner with marketing to convert the firm's brand, intellectual capital, events and community presence into business-development opportunities.

UHNW & Institutional Advisory / Client Leadership - 40%

- Build trusted relationships with institutional and UHNW clients, including families, business owners, investment committees, and key decision-makers.
- Advise UHNW families and business owners on integrated investment, tax, estate, succession, liquidity, and wealth transfer strategies.
- Serve as the primary advisor and coordinate with attorneys, CPAs, trustees, and other external professionals to deliver a cohesive wealth strategy.
- Lead strategic discussions around portfolio strategy, asset allocation, governance, liquidity, spending, and long-term objectives.
- Partner across internal investment, planning, reporting, and client service teams while maintaining ownership of senior client relationships.

Investment Knowledge & Professional Development - 10%

- Maintain a deep understanding of LVW's investment philosophy and broad expertise across institutional and UHNW investment strategies.

- Participate actively in investment committee discussions and collaborate with the research team to ensure client advice reflects the firm's best thinking.
- Maintain awareness of capital-market developments and their implications for client portfolios.
- Continue professional development across institutional investing, UHNW wealth management, governance and related advisory issues.

The UHNW & Institutional Investment Advisor is not responsible for supporting LVW's dedicated investment and research resources.

Leadership & Firm Development - 10%

- Contribute to strategic initiatives and serve as a visible representative of the firm in the marketplace, community and broader leadership efforts.
- Mentor colleagues and help strengthen the firm's collaborative, growth-oriented culture.
- Demonstrate the judgment, initiative and leadership potential to assume broader responsibilities as the firm evolves.

Candidate Profile

- 5-8+ years of experience in investment management, institutional consulting, wealth management, Investment advisory or a related field.
- Experience working with institutional investors, UHNW families or other sophisticated investors.
- Strong investment knowledge and the ability to discuss complex portfolio issues with sophisticated audiences.
- Demonstrated relationship-development and business-development capabilities.
- Strong communication skills and executive presence with the ability to engage sophisticated stakeholders confidently and credibly.
- Understanding of how institutional investment disciplines can be applied to sophisticated private wealth.
- Demonstrated initiative, intellectual curiosity and commitment to ongoing professional development.
- Sound judgment, integrity, a collaborative working style and a desire to become a long-term leader within LVW.

Relevant professional credentials such as the CFA, CFP, CAIA or MBA are valued but are not substitutes for strong relationship, advisory and business-development capabilities.

The ideal candidate is passionate about investing but energized by building relationships, earning trust, creating opportunities, and translating LVW's investment expertise into lasting institutional and UHNW client partnerships.

What Success Looks Like

- Build meaningful institutional and UHNW client relationships that drive new business growth.
- Expand LVW's institutional presence and support renewed growth in the channel.
- Serve as a trusted senior advisor to sophisticated clients across both institutional and UHNW markets.
- Demonstrate investment expertise and credibility in client and prospect interactions.
- Effectively leverage LVW's investment platform, team, and intellectual capital to deliver differentiated advice.
- Work seamlessly across client segments while strengthening LVW's advisory capacity.
- Develop into a key leader supporting the firm's long-term growth and client relationship strategy.

About the Opportunity

LVW serves both sophisticated institutional investors and ultra-high-net-worth families, and the investment challenges faced by these clients increasingly overlap.

Both require thoughtful asset allocation, access to institutional-quality investment opportunities, disciplined manager selection, sophisticated risk management, and the ability to build portfolios around complex long-term objectives. This role sits squarely at the intersection of those two client segments.