LaTeam
YOUR LATAM TEAM

About Lateam Partners

Lateam Partners is a premier recruitment agency specializing in hiring top **English-speaking** talent in **Latin America** for U.S.-based companies. We connect skilled professionals with dynamic opportunities, offering competitive salaries, career growth, and the chance to work with leading international businesses.

By joining Lateam Partners, you gain access to **exciting remote roles, a supportive work culture, and ongoing professional development**. We pride ourselves on matching top-tier talent with high-quality employers, ensuring a rewarding experience for both candidates and clients.

If you're looking to advance your career with **a stable, well-paid, and growth-oriented opportunity**, apply today and become part of our thriving network!

www.lateampartners.com

Job Title

Financial Analyst

Location

Remote

Client

Undisclosed

Job Summary

You will build and lead a high-net-worth advisory practice, focusing on clients with significant investable assets. You will be responsible for growing and managing a portfolio of sophisticated clients, providing comprehensive wealth-management solutions, delivering a consistent return on assets (~0.65% ROA), and ensuring each client meets the minimum threshold of US $2 million. You will also leverage Activest's infrastructure—technology, investment team, compliance, marketing—to amplify your client service and business growth.

Responsibilities

- Develop and maintain a portfolio with minimum AUM of US $200 million (or US $400 million in mixed/brokerage model).
- Onboard and manage clients with investable assets starting at US $2 million.
- Deliver investment outcomes in line with target ROA of ~0.65%.
- Provide holistic advisory services: asset allocation, alternative investments, family-office solutions, risk & legacy planning.
- Utilize Activest's support infrastructure: advanced tech stack, operations, legal/compliance, marketing & communications.
- Cultivate and deepen long-term client relationships, aligning with the firm's value of service, independence and integrated solutions.
- Collaborate with internal teams across portfolio management, operations, marketing, and compliance to deliver exceptional client service.
- Drive new business growth while retaining high client satisfaction (Activest reports >90% retention for transitioning advisors).
- Operate with full integrity, excellence, and a human-centric approach consistent with the firm's culture

Qualifications

- Proven track record managing a book of high-net-worth clients and achieving strong ROA.
- Portfolio AUM of at least US $200 million in advisory model (or US $400 million in brokerage/mixed).
- Experience working with investable assets of US $2 million minimum per client.
- Strong business development orientation while maintaining high client service and retention.
- Comfortable working in a collaborative and entrepreneurial environment, leveraging firm infrastructure.
- Excellent communication skills in English and Spanish preferred (Mexico/LatAm focus).
- Must adhere to fiduciary standards and compliance requirements.

Apply to this position

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