

# Investment Associate Cover Letter

18246 Okuneva MountainSouth Sophiaview, NE 76581

**Dear Story Heaney,**

I would like to submit my application for the investment associate opening. Please accept this letter and the attached resume.

Previously, I was responsible for support for competitive intelligence on managed investment platforms, products and solutions for U.S.

Please consider my qualifications and experience:

- Understand and support PMs' monthly workflow, and provide investment-related assistance to other partners (e.g., administrators, wealth strategists)
- Track trade activity from entry, through execution to settlement
- Provide proactive communication to PMs around bond maturities, cash balances
- Monitor PMs' desks in their absence, and distribute investment research and portfolio construction information when and where appropriate
- Provide backup to other PMs, Account Managers
- Security/investment industry knowledge
- Understanding and supporting portfolio managers' workflow, and providing investment-related assistance to other partners (e.g., trust advisors, wealth strategists)
- Interacting with partners, primarily administratively, on a daily basis to receive and communicate information on all aspects of a client relationship or portfolio

**Thank you in advance for taking the time to read my cover letter and to review my resume.**

Sincerely,

Oakley Kovacek