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Job Title

Client Service & Marketing Associate (Wealth Management)

Company

Confidential

Location

Los Angeles, CA

Job Type

Full-time

Salary

Up to \$75,000, depending on experience

Industry

Wealth Management

About the Company

Client is a Registered Investment Advisor (RIA) employing just over 20 individuals. The company's main business is to manage equity, fixed income and balanced portfolios for clients. Client also provides financial planning for clients as well as having a network of unaffiliated estate and retirement professionals. The company has an in-house research team (for both stocks and bonds) as well as being an approved user of Dimensional Fund Advisors (Dimensional).

Job Description

The Client Service & Marketing Associate will work directly with account executives and be responsible for providing day-to-day administrative support to the marketing department, including client servicing, telephone communications, preparing presentations, updating marketing materials, data input, coordinating client meetings, compilation of marketing presentations and ability to discern priorities.

Essential Duties and Responsibilities

- Prepare comprehensive quantitative analyses for prospective clients which include stocks, bonds, mutual funds and other investments
- Prepare client performance reviews comprised of text, spreadsheets and graphs
- Mailing of quarterly client statements
- Liaison with clients, operations, and custodians to meet various client requests and inquiries
- Prepare new account paperwork for clients and designated custodian
- Send, pick up and/or distribute mail and FedEx packages
- Prepare expense reports

Experience and Qualifications

- 2-5 years of sales support and client service working with high net worth individuals and institutional clients at an investment management firm, private bank, or broker/dealer with history of increasing responsibilities.

- Experience with and knowledge of paperwork and workflow associated with opening accounts and account maintenance at custodians such as Fidelity, TD Ameritrade preferred
- Advanced math skills and proficient computer skills in Microsoft Word, Excel and Power Point
- Working knowledge of Bloomberg, Principia Pro/Morningstar, Salesforce preferred
- Working knowledge of Laserfiche or document management systems preferred
- Meticulous attention to detail with outstanding organizational skills
- Effective interpersonal skills and flexibility to adapt to a variety of personalities.
- Exceptional communication skills
- Flexible and possess exceptional analytical and problem-solving skills
- Ability to prioritize assignments and work in a fast-paced environment.
- Flexible and willing to handle last minute projects as they arrive

Education

- Bachelor's degree with an emphasis on business