

**Position Title:** Client Service Associate

**Department:** Sales

**Division:** Client Service

**Reports To:** Manager of Client Services

**Basic Purpose:** The Client Service Representative works closely with Portfolio Executives, prospective clients and existing clients in every aspect of the sales process, and relationship management. They may act as the first point of contact for existing client account maintenance requests. They are an integral component in client service and client management.

**Principal Responsibilities:**

* Communicate clearly via phone, email and written correspondence to help establish and maintain quality client relationships
* Cover phone calls for reception and overflow phone calls for the company
* Maintain confidential up to date client personal and account information in CRM Database (Salesforce)
* Utilize all administrative systems to perform job responsibilities including but not limited to Wealth Central, Orion, Square 9
* Process and execute all client cashiering requests and tasks timely and accurately
* Prepare detailed portfolio analysis of current and proposed holdings for potential clients
* Create Investment Proposals for potential clients
* Assist Portfolio Executives throughout the client onboarding process to establish new client relationships
* Work directly with Portfolio Executives to maintain and strengthen existing client relationships
* Provide clients with the necessary documentation to create, transfer and maintain accounts
* Facilitate the timely and accurate transfer of client assets
* Work with custodians to resolve client account issues (Fidelity, Vanguard, Schwab, E\*TRADE)
* Work closely with Operations to produce Quarter End Client Reporting, and client account maintenance items
* Complete ad hoc special projects as assigned

**Qualifications:**

* Bachelor’s degree and or equivalent work experience in the mutual fund industry (1-2 years preferred)
* Strong customer service, communication, writing and interpersonal skills
* Strong computer skills specifically in MS Excel, Access, Word, PowerPoint
* CRM and portfolio accounting database experience a plus
* Strong attention to detail, team player and ability to multitask

**About Us:** Adviser Investments is an independent wealth management firm serving individuals, trusts, institutions and foundations with personalized investment management and in-depth financial and tax planning. Our portfolios include actively managed mutual funds, exchange-traded funds, individual stocks and bonds, socially responsible investments and tactical asset allocation strategies. We have particular expertise in Fidelity and Vanguard mutual funds. We advise more than 3,500 clients across the country and have over $6 billion under management. At Adviser Investments, we pride ourselves on being The Adviser You Can Talk To®. We listen. We take the time to get to know you, your family, your passions and your values. Our goal is to create a personalized wealth management plan that gets you where you want to go while still allowing you to sleep at night.

**Why You Should Work at Adviser Investments:** We offer the opportunity to advance your career at a company that combines the stability of an established business with the fast-paced entrepreneurism of a growing firm. At Adviser Investments, you’ll find a flexible, highly collaborative, positive environment—sharing knowledge with colleagues, working across departments, collective problem-solving and celebrating individual and team successes are everyday experiences.

Beyond your day-to-day responsibilities, you’ll have the chance to participate in and benefit from our wide-ranging Adviser Cares program, which includes community service events, diversity, equity and inclusiveness roundtables, in-house mentoring, the Women in Wealth Management Initiative and more. I encourage you to browse our current openings (linkedin.com/company/adviser-investments/jobs/)—we are always on the lookout for talented self-starters seeking professional growth and have new positions to fill in multiple departments. Join our team and become part of Adviser Investments’ quest to deliver 1% more value every day to our clients, our community and our peers.

**To apply, email resume to** [**dmastroianni@adviserinvestments.com**](mailto:dmastroianni@adviserinvestments.com)