Reference Number:
5722

Job Description:

Private Wealth Management Firm is looking for an Registered Client Associate with no more that 3 or 4 yrs. experience.

The primary function is to provide a wide range of sales, service, administrative and relationship management support to assigned Wealth Advisors and investment professionals across Registered Investment (RIA), Broker-Dealer and Trust or team of same and to be the first point of contact for clients or prospects.

Acting as the liaison between the investment professional/client and the PWM middle office functions/operations (i.e., client services, trading, portfolio management, billing and fee support, performance and trust), this position requires strong relationship management skills in order to build strong, successful partnerships between all parties.

Management support would include managing investment professional?s appointment schedules, pre-appointment preparation (pre-call planning) and post appointment follow-up (review scheduling).

Participate in client meetings, manage communication through telephone and email, prepare presentations for clients, transaction processing and product/marketing support.

You will be supporting a team of 3

Great culture, excellent compensation and benefits - growth opportunities.

Hours are 7 am to 4 pm or 7:30 am to 4:30 pm (flexible on hours)

Must be licensed S/7, 63 and clean U4 and able to clear background/credit check

SEND RESUME AS AN MS WORD ATTACHMENT TO diane@dmstone.com