Senior Client Service Associate

Ensemble Capital Management, LLC is a boutique wealth management firm that provides in house investment management for high net-worth individuals, families, and institutions. With $500 million in AUM and a nine-person staff, Ensemble Capital is in the midst of a multi-year growth plan and seeking to hire a client service associate to join the team.

The client service associate's primary role will be to work directly with the director of wealth management to provide an outstanding client experience. In addition to client service responsibilities, the associate will support marketing and business development related activities. Ensemble has recently implemented a new CRM and workflow management system (Tamarac CRM) and the associate will play an important role in helping the company fully deploy the software's capabilities. The role requires someone who is effective in a client facing role while also efficiently managing internal processes.

We foster a work environment that encourages an entrepreneurial and performance driven culture, while supporting employees and their families in managing work-life balance. The position offers a competitive compensation package with material bonus opportunity and provides an excellent benefits package.

Primary Responsibilities include:

- Engage in client facing activities such as responding to inbound client requests, attending client and prospect meeting, and interfacing with our clients' other professional advisors
- Maintain client service management reports to ensure that all clients are receiving expected service levels
- Support the firm's wealth managers to prepare for meetings, craft financial plans, and maintain client records
- Manage communication between the client service group and the firm's operations and portfolio management groups
- Support the production of client and prospect events
- Maintain and update marketing material and assist with the execution of marketing campaigns

Requirements:

- 3+ years of client service and/or marketing experience at an RIA, wealth management firm or similar financial services company
- Process focused and detail oriented with strong organizational skills
- Impeccable written and verbal communication skills – ability to handle communications with client, prospects, partners, and vendors
- Strong familiarity of financial account types (IRAs, trusts, foundations, etc), wealth management activities (wire transfers, investment policy statements, etc), and basic investment knowledge of stocks, bonds, mutual funds, etc.

Please send your resume to Ludo Thomasson at Ludo@ensemblecapital.com