



Position Description

Title: Client Service Associate

Daintree Advisors is a multi-family office and wealth advisory firm created in 2010 by a group of seasoned investment and planning professionals. We guide and empower clients to step back and “See the Forest” so that they can make thoughtful financial decisions for themselves and their families.

Job Summary

The Client Service Associate will support Daintree Client Advisors with client service and operational transactions, financial planning, and investment management, while exercising discretion and independent judgment. The Client Service Associate will work closely with Daintree professionals to acquire the technical knowledge and relationship management skills necessary for advancement.

Duties and Responsibilities

The Client Service Associate will work with multiple client teams providing support in client service, financial planning, and investment management services for Daintree’s Wealth Management and Family Office clients. The position will include direct interaction with clients, clients’ extended families, and clients’ outside advisors. Responsibilities may include investment reporting and rebalancing, participation in client financial and tax planning, communication with outside advisors, and special projects.

Qualifications and Skills

- 1-5 years’ experience in the financial services industry; working directly with clients preferred
- Bachelor’s degree from an accredited college or university
- CFP® certificate preferred
- Proficiency in Word, Excel, and Outlook
- Organized, detail-oriented, and multitasking skills
- Client first philosophy
- Good written/verbal communication and interpersonal skills
- Team player, collaborative, and works effectively with others and a variety of different client personalities
- Desire to work successfully in a small company environment

Salary and Benefits

This is a full-time, exempt position. Salary will be based upon experience. A full benefits package is available.

Please submit resume and cover letter to Karen Angrisano at kangrisano@daintreadvisors.com

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