

Ballentine Partners – High Net Worth Team**Client Service Associate****POSITION SUMMARY**

The High Net Worth team provides wealth management services to families with investment assets generally between \$3m - \$20m and has grown rapidly over the last 10 years.

The Client Service Associate acts as a critical team member and facilitator in support of Senior Investment Advisors and Analysts working with clients, their external advisors, and other internal partners. The overall goal is to serve clients' wealth management needs and to help the team operate effectively and efficiently. Within our highly-collaborative, team-based service model, you will have significant responsibility in a demanding and fast-paced environment.

A bachelor's degree, strong computer skills and 2-3 years of experience in professional services is preferred. The right candidate will be someone who:

- Can learn quickly to do things they haven't done before
- Dives in to get things done proactively
- Takes in a lot of different kinds of information and then quickly and effectively sorts out what to do
- Enjoys juggling multiple things at the same time and has excellent skills in prioritizing and moving through a variety of different tasks in a day

KEY RESPONSIBILITIES**Act as a key facilitator and service provider for a broad variety of client matters.**

- Provide proactive and comprehensive administrative and client management support to the Senior Advisors and team
- Serve as the Senior Advisor's project manager for prospects, onboarding and client administration
 - Manage the operational flow of onboarding new clients: contracts, applications (with our internal Service Team), ongoing information, asset transfer, document retention, and database/CRM management
 - Drive the administrative flow for assigned client and prospect meetings: Assemble meeting materials, complete client management workflows, generate quarterly performance reports, manage client billing and fee deduction
 - Track and support business development efforts; track incoming and outgoing referrals
- Attend client meetings, as needed

Serve as the first point of contact for most ongoing client requests

- Work collaboratively with custodians (such as Fidelity), our Service Team and other third parties to execute service requests and portfolio management tasks for clients and the team: distributions, cash balance alerts, deposits, tax payments, transfer of assets, verifications, private investment documentation, etc.
- Communicate effectively with and both obtain/provide information from/to custodians, CPAs, and estate attorneys

BALLENTINE NORTH

Lakes Region NH
PO Box 1860 | 55 Mill St
Wolfeboro, NH 03894
Phone: 603-569-1717

HEADQUARTERS

Boston Area MA
230 3rd Ave Fl 6
Waltham, MA 02451
Phone: 781-314-1300

BALLENTINE SOUTH

Palm Beach Area FL
3507 Kyoto Gardens Dr Ste 320
Palm Beach Gardens, FL 33410
Phone: 561-508-4500

Provide proactive and comprehensive administrative support

- Manage complex calendars and client sensitivities to schedule client & prospect meetings and travel, thinking through and managing conflicts and priorities.
- Be accountable for important details.
- Manage organizational activities for Senior Advisors
- Prepare and submit expense reports
- Arrange travel (airfare, hotels)
- Provide other support – printing, filing on server, contact management, calendar support, information gathering, etc.

Perform other duties as assigned or required.

KEY COMPETENCIES

- Demonstrated interest in wealth management for families
- Self-starter and proactive (i.e., anticipates problems, raises suggestions)
- Comfortable working both independently and in a team structure
- Comfortable working with senior stakeholders and sophisticated clients
- High professional standards, judgment, and discretion at all times
- Highly organized, very strong attention to detail, and ability to prioritize
- Comfortable managing multiple parallel tasks
- Accurate, organized multi-tasker
- Professional communication skills, verbal and written
- Excellent interpersonal & relationship skills; positive attitude; flexibility
- Ability to learn new systems and procedures quickly
- Ability to perform successfully in a fast-paced, knowledge-intensive, and service-oriented environment keeping with Ballentine Partners' values and culture.