

Title: **Associate Client Relationship Manager**  
Employer: **Riverbridge Partners, LLC**  
Location: **Minneapolis, MN**  
Status: **Full Time; Exempt**  
Reports To: **Andrew Turner**

### **Company Profile**

Riverbridge Partners, LLC is an Investment Management Firm located in downtown Minneapolis, Minnesota. Riverbridge was founded in 1987 and manages growth equity investment strategies for institutions and high net worth individuals.

### **Job Summary**

The Associate Client Relationship Manager is a position that provides assistance to Riverbridge Client Relationship Managers in all aspects of serving the client. Responsibilities include portfolio administration, data gathering, modeling, case design, scenario building, plan development, and presentation development. The position may participate in client meetings with Relationship Managers.

### **Duties and Responsibilities**

The Associate RM can expect to focus in the following areas:

- Gather, organize and synthesize client data within a financial planning context
- Monitor and maintain client portfolios
- Prepare client financial plans and presentations for review by supervisors
- Prepare financial scenarios
- Attend client meetings in a technical, supporting and learning role
- Serve as primary backup to Client Service Associate

### **Qualifications**

The Associate RM position typically requires the following qualifications:

- Two years of experience in financial services industry
- Solid academic track record
- Bachelor's Degree from an accredited college or university
- CFP (preferred) and/or CPA (preferred)
- Proficiency with Word, Excel, PowerPoint and Outlook
- Detail-oriented, accurate, organized, able to set priorities
- Strong written and verbal communication skills
- Self-starter, takes initiative
- Team player, collaborative, able to work with and through others
- Desire/ability to work successfully in a small company environment

To apply, please submit your resume and cover letter to [AndreaS@riverbridge.com](mailto:AndreaS@riverbridge.com)

Riverbridge Partners, LLC is an Equal Opportunity Employer