

About Allodium:

Allodium provides comprehensive financial planning & investment consulting services to help individuals, families & small organizations achieve their investment goals & simplify their financial lives. We launched Allodium to provide the very best financial advice & personal service to a limited number of clients in the Twin Cities area. We believe the best advice is completely objective & aligned with our clients' best interests – without potential conflicts of interest. To this end, Allodium is a fee-only Registered Investment Advisor (RIA) that is completely independent from banks, brokerage firms, investment custodians, mutual fund companies & other financial service providers.

To learn more about Allodium, please visit our website at www.aicria.com.

Job Purpose:

Serve as Allodium's primary client service associate, providing exceptionally friendly, helpful, high-quality & fast service to our clients to maximize their satisfaction & earn their trust, confidence & referrals to other prospective clients.

Responsibilities:

1) Client Service & New Client Onboarding - (90%):

Serve as Allodium's primary client service associate, delivering exceptional service to our clients:

- Independently & professionally handle client requests & client account maintenance activities for existing clients.
- Help investment consultants with client service activities & with setting up accounts for new clients.
- Schedule & help prepare for client meetings.
- Serve as lead securities trader for the firm, & assist secondary trader(s), as needed.
- Serve as primary liaison to Charles Schwab (Schwab) service team that supports us.
- Serve as primary expert for client service functionality on Schwab Institutional site to train & coach others.
- Help ensure that main phone line is always covered by a live person during Allodium business hours.
- Pleasantly greet clients who visit our office.
- Independently manage and/or assist with client-service-related projects, as needed.
- Bind & mail quarterly client investment performance reports & annual review documents.

2) Operations & Other - (10%):

Lead or assist with a variety of operational tasks to help firm operate efficiently:

- Help Client Service Committee Chair lead committee meetings by planning & facilitating the meetings.
- Prep client-related documents for imaging, & assist with imaging these documents for future reference, as needed.
- Help maintain professional & well organized office environment to leave a positive impression with our visitors.

Qualifications:

Minimum Qualifications:

- BA or BS degree, ideally in business or related field.
- 3 years of client service experience with demonstrated client-service orientation & excellence.
- Ability to reliably work week days from 8 am - 5 pm in our Minneapolis office.
- Pleasant, professional & friendly manner with excellent interpersonal skills with clients & peers.
- Strong team player.
- Highly organized with proven attention to detail.
- Demonstrated reliability & punctuality.
- Demonstrated flexibility, versatility & ability to simultaneously juggle multiple projects & priorities.
- Proven analytical & independent problem-solving skills.
- Highly proficient with Microsoft Office & other office software & eager to learn how to use more.
- Highly proficient with office technology like computers, copiers, printers, fax machines, scanners etc.
- Unquestionable personal & business ethics & integrity.
- Excellent written & verbal communication skills.

Preferred Qualifications:

- Experience working in professional office environment, ideally in the financial services industry.
- Experience with following websites & software:
 - Schwab Institutional website or similar service website of other large investment firm.
 - CRM software like Salesforce.com.
 - Electronic document management software like Laserfiche.
- Independent project management experience.

Salary & Benefits:

Base salary commensurate with experience, qualifications & performance. Bonus opportunity is available. Competitive benefits including paid time off & medical, dental & disability insurance.

How To Apply:

Please send brief letter of introduction, resume & minimum salary requirements to info@aicria.com