

Client Account Manager Associate - Financial Services

Job Description

We're looking for the right person to join our firm as an Associate Client Account Manager, to assist our current team by meeting with clients in partnership with Senior Client Account Managers, as well as managing client relationships individually.

Stevens Foster Financial Advisors is a highly regarded Registered Investment Advisory firm that provides integrated financial planning to high net worth individuals and corporate executives. This includes financial planning, investment advice, tax planning, tax preparation, estate planning, and risk management. We consistently have been ranked by Barron's as being among the top advisory firms in the U.S. We have also been ranked by the Minneapolis/St. Paul Business Journal as one of the Twin Cities top wealth advisors since the list was first published in 2007.

This position would require you to understand and convey client goals and objectives to the rest of the organization, and to work productively with others on our team to design effective options to meet those goals. You would be responsible for all aspects of client management, from client meetings, phone calls and follow up, to working collaboratively with our support staff, tax, financial planning and investment teams. You will need to learn quickly, handle multiple responsibilities, prioritize and meet deadlines.

Education and Experience Requirements

- 3+ years of financial services experience required
- Bachelor's Degree required
- CFP or CPA/PFS a plus

Skills Required for Initial and Long-Term Success

- Clear, professional, verbal and written communication in English
- Basic understanding of financial terminology, concepts and account transfer process.
- Basic investment knowledge
- Basic individual tax knowledge
- Basic understanding of life and disability insurance, Social Security benefits, estate planning, employee benefit plans, deferred compensation, stock options, college funding strategies, retirement plans, and tax principles
- Microsoft Office Suite (Word, Excel, Outlook)

Essential Personal Attributes

- Passion for customer service, technical excellence, and efficiency
- High level of motivation to master new skills
- Organized; capable of managing one's own time, priorities, and deadlines
- Committed to maintaining confidentiality
- High degree of integrity, trustworthiness and dependability
- Detail oriented
- Professional in presentation, appearance and attire

How to Apply

Please submit your resume to stevensfoster@stevensfoster.com for consideration.