Stonebridge Capital Advisors, LLC

Title: Client Relations/Operations Specialist

Reports To: Director of Client Relations/Operations

Status: Full Time

Stonebridge Capital Advisors is a dynamic and nationally recognized Twin Cities based Investment Management Company celebrating over 20 years of providing investment and private wealth management services. We have always served our clients as a fiduciary; meaning our clients' best interests always come first. As a diverse team of professionals, we work together in achieving our clients' goals. We value the dedication, integrity and commitment each Stonebridge team member plays in our Company's success.

Purpose of Position

Our growing organization is searching for a candidate who is highly motivated, enjoys building relationships, and is passionate about providing exceptional customer service for clients and prospects while working within a truly energetic and compassionate environment.

This team member will work in collaboration with the Director of Client Relations/Operations, Portfolio Managers and Investment Advisors to provide overall portfolio maintenance in all aspects of client relations and investment activity.

Summary of Job Responsibilities

- Exemplify Company Core Values: establish customized services each client needs to attain their overall goals
- New Account and Securities Set Up: prepare and process the necessary paperwork to set up new accounts and transition assets between various custodians
- Daily Interfacing: provide assistance and exceptional service to clients, advisors and custodians
- Manage Client Cash Flow: set up and implement manual and systematic distributions
- Client Account Maintenance: provide services to add and/or update client information and account features
- Month/Quarter End Reporting: assist with bookkeeping of accounts, client reporting and reconciliation
- Quarterly Portfolio Billing and Advisor Remittance: submit quarterly management fees and payments to partnered advisors
- Participate in Company and partnered community events

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Preferred Education & Experience

- Bachelor's Degree or relevant experience
- Knowledge of financial industry, investments and accounting
- Experience in building and maintaining client relationships

Desired Skills

- Possesses excellent written and verbal communication skills
- Client Service oriented
- Proficient use of Accounting and CRM databases
- Knowledge of Microsoft Office products
- Solid attention to detail and accuracy
- Strong time management skills
- Works well independently and with teams

Compensation

Stonebridge Capital Advisors offers comprehensive benefits and a competitive salary based on experience and qualifications.

Contact

To apply, please submit your resume and cover letter to LWessel@Stonebridgecap.com.