

## Client Service Associate

### **Providing exceptional service to our clients starts with investing in exceptional people!**

We are an independent wealth management firm committed to providing "Advice at a Higher Level" to our clients. A contributing factor to our success is our unique team structure. How do we build a successful team? We foster a culture of professional development, collaboration, and respect. We are passionate about what we do. We have fun, we work hard, and we are nice to each other. A successful team takes care of each other. This translates to a highly competitive Total Rewards package, including a generous benefits package and a paid time off policy that reflects our commitment to a healthy work-life balance.

### **The Client Service Associate Role**

The Client Service Associate ("CSA") performs administrative duties which directly impact the client experience. The CSA supports the Relationship Managers in preparing and processing documentation related to client implementation and ongoing maintenance for private clients.

### **Duties & Responsibilities**

- Prepare and process documentation related to client onboarding and maintenance including account applications, transfer documents and other forms as required. Log all activities in the firm's CRM in a timely and accurate manner.
- Complete miscellaneous administrative tasks that support the client relationship as assigned by the Relationship Manager and log all activities in the firm's CRM in a timely and accurate manner.
- Perform client and prospect data entry in the firm's CRM. Ensure data accuracy and integrity and keep records current on existing and prospective clients.
- As requested, coordinate client retention processes including anniversaries, Thank You notes, flowers and/or gifts.
- Positively engage with all members of the team in a professional office setting to support and advance Cable Hill's culture.
- Perform back-up duties for Administrative Specialist. May assist with general office duties, including answering incoming phone calls, greeting clients, office supply management, mail processing, internal and external event coordination and meeting management.
- Assist with projects as needed.

### **Professional Qualifications**

- A minimum of two years of administrative experience in a professional setting. Experience must include professional interaction by phone and in person with clients. Finance industry experience preferred.

- Expected to gain competence in industry terminology and concepts that support their job description.
- Undergraduate degree required.
- Proficiency in Microsoft Office Suite products required.
- Salesforce and DocuSign experience preferred.

**Total Rewards Package Highlights**

- Competitive compensation
- Cable Hill pays 90% of medical, dental and vision coverage and 100% of life and disability
- Generous vacation time and sick time policy plus paid parental leave
- A 3% contribution to 401(k) plus a profit-sharing contribution after 1 year
- Commuter benefits
- Early close Fridays in the summer
- Ability to work from anywhere up to 2 days per week and for one week every 6 months
- Team building events
- A caring and supportive growth culture

***We strongly urge people from unrepresented groups to apply.***

Cable Hill Partners provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, sexual orientation, national origin, age, disability or genetics. In addition to federal law requirements, Cable Hill Partners complies with applicable state and local laws governing nondiscrimination in employment. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

Cable Hill Partners expressly prohibits any form of workplace harassment based on race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, genetic information, disability, or veteran status. Improper interference with the ability of Cable Hill Partners' employees to perform their job duties may result in discipline up to and including discharge.