STONEBRIDGE
Capital Advisors

Title: Client Relations Specialist

Reports To: Director of Client Relations

Status: Full Time

Stonebridge Capital Advisors is a dynamic and nationally recognized Twin Cities based Investment Management Company celebrating over 25 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.

Overview

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 Client Relations Team, Portfolio Management Team, Relationship Managers, and Investment Advisors to provide client service, account maintenance and investment activity of client portfolios.

Summary of Job Responsibilities

- Exemplify Company Core Values: establish customized services each client needs to attain their overall goals
- Daily Interfacing: provide assistance and exceptional service to clients, advisors, and custodians via email, telephone and in person
- New Account and Securities Set Up: prepare and process the necessary paperwork to set up new accounts and transition assets between various custodians. Once the account is open at the custodian, enter new account and billing information into the portfolio management system
- Update and Manage CRM: enter pertinent client information that will contribute to the management of portfolio
- Client Account Maintenance: provide services to add and/or update client information and account features
- Provide personalized high net worth financial services and tailored lending solutions, such as ACH, journals, wires, and lending programs through our custodians.
- Manage Client Cash Flow: set up and implement manual and systematic distributions
- Set up and services for retirement plans: IRA's, 401(k), target benefit plans, profit sharing plans, defined benefit plans
- Assist in the set up and services of financial plans, estate plans, trusts, endowments, foundations

Summary of Job Responsibilities (cont.)

- 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

Qualifications

- Bachelor's Degree or equivalent, relevant experience in business, finance
- Knowledge of financial industry, investments and accounting
- 2+ years' experience in building and maintaining client relationships
- Client service oriented
- Possesses excellent written and verbal communication skills
- Solid attention to detail and accuracy
- Proficient with Microsoft Office programs and accounting
- Knowledge of CRM database use
- Ability to solve problems quickly and creatively
- Strong time management skills
- Works well independently and within teams

Salary & Benefits

Stonebridge Capital Advisors offers a competitive salary based on experience and a comprehensive benefits plan that includes medical, dental and life insurance, 401(k), health savings plan, optional vision, access to gym facilities, community volunteering, and paid company holidays.
Salary: $60,000+

Contact

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