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CLIENT SERVICE ASSOCIATE

Client Service Associate will be responsible for providing operational and service support to our client base. A successful candidate will need to think creatively, work in a fast-paced environment and effectively prioritize. This position provides the opportunity to work in a professional business environment, experience real-world challenges, and expand one's expertise in the field of investment management with a recognized, national leader in the investment consulting industry.

While much of the team is remote, traveling, or hybrid, this position requires a physical presence in the office, ensuring uninterrupted excellent service to our clients and support for the advisory team.

RESPONSIBILITIES

- Enhance the client experience by providing exceptional client service in various functions including but not limited to new account opening, document completion, and resolving client inquiries
- Execute money movement transactions for clients, as well as transfers to/from separate account managers and hedge funds/private investment funds
- Proactively coordinate client service activities in conjunction with the advisory team
- Organize materials for client meetings, as well as ad hoc requests
- Actively participate in the firm's compliance and efficiency efforts
- On occasion, answer in-coming calls and greet clients
- Perform other duties and tasks as requested

REQUIREMENTS

- Bachelor's Degree in business or finance desired; prior experience in the investment industry a plus
- Strong attention to detail and organization skills
- Self-starter and the ability to think creatively and out-of-the-box
- Strong communication, interpersonal, and problem-solving skills
- Strives for continuous improvement
- Strong proficiency in all Microsoft Office programs, specifically Excel, Word, and PowerPoint
- Experience with Outlook and CRM applications a plus
- Professional demeanor
- Proven ability to work in a team-oriented environment
- Time-management skills
- Resourcefulness, energetic, and the ability to operate in a dynamic, stressed and fast paced environment
- Client service focus
- Discretion with confidential information

ABOUT THE FIRM

LVW Advisors, an independent Rochester-based Registered Investment Advisor is considered one of the leading investment management firms in the nation. Our team of experience financial advisors provides customized investment management solutions and comprehensive wealth management plans for institutional investors, individuals and family offices. LVW Advisors is an award-winning firm that is consistently recognized in the industry for sophisticated investment management solutions, research capabilities and the delivery of an exceptional client experience.

For more information, visit our website at www.lvwadvisors.com

LVW Advisors is an Equal Employment Opportunity employer Minority/Female/Sexual Orientation/Gender Identity/Individual with Disability/Protected Veteran. We welcome all persons to apply.

The Art of Serious Investing