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SENIOR CLIENT SERVICE ASSOCIATE

The Senior 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, expanding one's expertise in the field of investment management with a recognized national leader in the investment consulting industry.

Remote work arrangements will be considered for highly qualified candidates.

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
- Answer in-coming calls and potentially join in on meetings
- 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
- Ability to self-start and think creatively
- Strong communication, interpersonal, and problem-solving skills
- Desire 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 and positive attitude
- Proven ability to work in a team-oriented environment
- Time-management skills
- Energetic, positive attitude with the ability to operate in a dynamic, fast paced environment
- Discretion with confidential information

ABOUT THE FIRM

LVW Advisors is an independent Rochester-based Registered Investment Adviser. Our team of experienced financial advisors provides customized investment management solutions and comprehensive wealth management plans for institutional investors, individuals and family offices. LVW Advisors is consistently recognized in the industry for sophisticated wealth management, research capabilities and the delivery of an exceptional client experience.

For more information, visit our website at <https://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