



Client Service Support Assistant

Cobblestone Capital Advisors, LLC is a privately-owned, Rochester-based, SEC registered, investment advisor offering comprehensive investment advisory and wealth management services. The firm manages over \$2.3 billion in assets and has experienced steady growth since its founding in 1986.

Job Summary

We are seeking an enthusiastic candidate to join our firm as a Client Service Support Assistant (CSSA). This role will be an integral part of the Client Service Team and will be responsible for supporting team members across the firm and providing the highest quality of service to our clients. The CSSA does not have an assigned client base but works with all Client Service Associates (CSAs) to provide consistent support and coverage.

Duties and Responsibilities

- Support client teams in the execution of client-related work such as:
 - New account openings
 - Account transfers
 - Distribution requests (ACH, wires, journals, checks)
 - Meeting preparation
 - Quarterly and Periodic Reporting
 - Name and address changes
 - Gift processing
 - Check deposits
 - Bill payments
- Ensure that all client needs, and requests are handled promptly, accurately, and professionally
- Learn and become able to interface independently with our primary portfolio accounting and CRM systems
- Maintain customer relationship management (CRM) system and ensure accuracy of Tasks, Cases, and Records
- Maintain and administer all aspects of the quarterly reporting process
- Perform administrative duties: filing, mailing, scanning, photocopying, binding, faxing
- Work as part of a team to answer phone lines and ensure calls are routed to proper person
- Provide administrative support for our claim litigation process
- Communicate and collaborate with team members regarding accounts and processes
- Provide full back-up support for the CSAs (Client Service Associates)
- Provide primary back-up support for the Receptionist and front desk responsibilities
- Continue to develop technical knowledge and expertise
- Guide others through your behavior - 'lead by example' within the team and across the firm
- Identify and evaluate daily workflows for process improvement opportunities and work with others to enact change
- Perform other job-related duties or special projects as assigned



Qualifications

- Associates degree from an accredited college or prior administrative work experience, financial knowledge preferred
- A friendly professional demeanor and ability to excel in a team-oriented environment
- Solid computer skills including capacity to learn new programs quickly
- Strong proficiency with Microsoft Office suite especially Excel, Word, PowerPoint
- Salesforce knowledge a plus or the ability to become proficient quickly
- Systems and process-oriented mindset
- Excellent communication and organizational skills
- Ability to manage time effectively, set priorities and meet deadlines
- Strong attention to detail; a high degree of accuracy is required
- Ability to learn and adapt to change
- Willingness to seek out new learning opportunities to increase your effectiveness in your assigned position

Who You Are

- **You Embrace Evolution**
You are able to manage changing priorities, are willing to look for solutions beyond the conventional, and are committed to applying new concepts to your work while learning from past experiences.
- **You Communicate to Connect**
You have the courage, confidence, and skill to communicate internally and externally regardless of the audience.
- **You Collaborate with Purpose**
You invite others' opinions into your decision-making processes, and you commit to the team approach, balancing the value you can add with others' contributions.
- **You prioritize to GSD (Get Stuff Done)**
You work well under pressure, can balance different projects and demands at the same time, are adept at managing deadlines, "managing up," and working with others to prioritize the most urgent and important actions to complete.
- **You are All In**
You demonstrate, in words and actions, enthusiasm and passion for Cobblestone's defining purpose, values, and the vision we share.
- **You're Proactive**
You like to identify what needs to be done and do it thoughtfully and creatively before being asked or before the situation requires it.
- **You Focus on Quality**
You set high quality standards and strive for continuous improvement and quality assurance. You follow up to ensure that deliverables, agreements, and commitments are fulfilled and have met expectations.



- **You Apply Organization Sensitivity**

You are aware of how your actions, decisions, and choices impact parts of the organization. You practice systemic thinking and understand how policies, practices, trends, technology, and information will affect not only you, but others in the organization.

Interested candidates must apply here:

https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&cclid=19000101_000001&jobid=457200&source=CC2&lang=en_US

No phone calls, please.

We are an Equal Opportunity Employer and our company's policies and practices relating to recruitment, employment, career development and advancement, promotion and retirement are based solely on merit, without regard to all legally protected classes, including but not limited to: race, color, sex, age, disability, religion, citizenship or immigration status, national origin, ancestry, military status or veteran status, marital status, familial status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law.