



## Client Service Associate

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

A Client Service Associate (CSA) will work closely with relationship managers, portfolio managers, wealth planners, private investments, and the back-office operations team to ensure high-quality service for Cobblestone's clients. This position requires financial industry knowledge, a positive professional attitude, strong computer skills, attention to detail, and the ability to work in a team environment. Our team approach to client service is a strength of Cobblestone and we are looking for the right candidate to thrive in our collaborative and supportive team environment.

### Duties and Responsibilities

- Ensure that all client needs and requests are handled promptly, accurately, and professionally.
- Responsible for accurately handling all aspects of the client account opening process - *custodial paperwork, portfolio accounting and CRM system set up, asset transfers, and client communication.*
- Monitor and research all money movement activity in and out of client accounts on a daily basis.
- Handle routine client requests for distributions, name and address changes, gift processing, bill payments, account information, etc.
- Create client presentations/communications through collaboration with portfolio managers, planners, private investments, and the back-office operations team.
- Maintain customer relationship management (CRM) system and ensure the accuracy of tasks, notes, and records.
- Responsible for answering phone lines and ensuring calls are routed to the proper person.
- Coordinate client communications and be a supportive part of the client service process.
- Handle ad hoc projects as assigned.
- Continue to develop technical knowledge and expertise.
- Guide others through your behavior – 'leading by example' within the team and across the firm.
- Identify and evaluate daily workflows for process improvement opportunities and work with Manager to enact change.

### Qualifications

- Bachelor's degree from an accredited college or university (or) Associates degree and prior financial services experience
- 3+ years financial services industry experience preferred
- A friendly, professional demeanor and ability to excel in a team-oriented environment
- Systems and process-oriented mindset
- Strong proficiency with Microsoft Office suite especially Excel, Word, PowerPoint
- Excellent communication and organizational skills
- Salesforce experience a plus
- Ability to manage time effectively, set priorities and meet deadlines

- Strong analytical and detail-oriented aptitude; a high degree of accuracy is required
- Notary public designation or ability to achieve within 6 months
- Ability to learn and adapt to change
- Willingness to seek out new learning opportunities to increase your effectiveness in your assigned position

**Cobblestone benefits include:**

- Significant contribution towards health insurance
- 401K matching contribution of up to 4% on employee deferrals
- Sabbatical Leave
- Paid vacation, sick time and holidays
- Group-term life/AD&D insurance – company-paid
- Vision, dental, voluntary life/AD&D insurance
- Supplemental Short-term disability and Long-term disability coverage – company-paid

**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=460807&source=CC2&lang=en\\_US](https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&cclid=19000101_000001&jobId=460807&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.