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 $2.6 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 team members, and the back-office operations team to ensure high-quality service for Cobblestone's clients. This position requires 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. We place a strong emphasis on being professional, pleasant, and courteous to our clients and to each other.

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 properly.
- Coordinate client communications and be a supportive part of the client service process.
- Contribute positively to the team and firm culture by offering your help and/or time whenever possible.
- 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.
- Two or more years of 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.

Please apply here: https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&ccId=19000101_000001&jobId=499562&source=CC2&lang=en_US

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