Bartlett Wealth Management: Client Relationship Associate

Position Overview

Bartlett Wealth Management is currently seeking a **Client Relationship Associate.** You will enjoy a positive work environment as well as a hybrid work schedule with the ability to work remotely two days per week. Awarded as one of Cincinnati Enquirer's Top Places to Work, Bartlett Wealth Management explores, builds, and executes investment and financial planning strategies tailored to meet clients' individual needs and objectives.

The Client Relationship Associate is a member of the client service team and will work closely with Wealth Advisors, Financial Planners, and clients of the firm and plays a critical role in supporting client service, retention, and business growth. Are you a Client Relationship Associate who is self-motivated and detail-oriented who loves assisting clients with their financial investment needs? If so, let's talk!

Key Responsibilities

- Demonstrate a client-first attitude as well as actively work to meet and anticipate the needs of the Advisors
- Assist with all facets of new client onboarding process including opening accounts, client portal set up and access, and managing all related account documents between clients, advisors, and investment custodians
- Manage client relationship management (CRM) records by maintaining client profiles, information, and activities
- Handle all distribution and money movement requests while adhering to all regulations and policies
- Schedule and organize client meetings for Advisors and coordinate meeting materials
- Utilize Bartlett's compliance software to ensure proper recordkeeping while using extreme discretion, maintaining confidentiality, and acting with the utmost integrity

Requirements

- 2 – 5+ years of relevant work experience, preferably in the financial services/investment management industry
- High School Diploma Graduate; Bachelor's degree from an accredited college or university or equivalent experience is preferred
- Proficiency with Microsoft applications, including Outlook, Word, and Excel with advanced skills for exporting and merging information
- Experience with CRM software, electronic document repositories, and Adobe Acrobat is preferred
- Proficiency in business English, composition, spelling, grammar, and punctuation and the demonstrated ability to efficiently compose and prepare correspondence and documents

Desired Attributes

- Ability to be respectful and approachable while building strong working relationships and maintaining a positive work environment
- Strong analytical and problem-solving skills along with the ability to remain calm while working under pressure
- A sense of urgency with issues and requests, following through in a timely manner. Ability to handle sensitive situations and maintain a high level of confidentiality and discretion
- A collaborative, team spirit and the ability to work with and through others
- Ability to handle multiple tasks and produce timely, accurate results in a busy environment while operating independently, initiating tasks, and following up with minimal direction

Benefits & How to Apply

Benefits include a competitive base salary, being part of a growing company, as well as a competitive and comprehensive benefits package including 401(k) match, profit sharing, attractive healthcare coverage, dental, vision, flexible spending accounts, life insurance, long-term and short-term disability coverage, professional development assistance, ample paid time off and a hybrid work schedule.

A Slice of HR is working with this client on a retained search basis. If you meet the qualifications and want to join this team of committed, experience and passionate professionals please send your resume to **meagan@asliceofhr.com.**