About the job

About Litman Gregory and iM Global Partner

Founded in 1987, Litman Gregory offers wealth management services to individuals, families, and endowment and foundation organizations. Our research services are driven by strong asset allocation and manager selection expertise. Excellence and quality are core to our values, and our team of people is focused on client-centered service and collaborative connections.

Our wealth management business is based in the San Francisco Bay area, and we now benefit from a global network of professionals in 16 locations worldwide following our integration into iM Global Partner, a worldwide asset management network. Our relationships are built on trust, respect, and integrity. We believe that 'Performance is born out of people' and that is clearly the case for our team of hard-working, motivated employees. We are growing fast, and as we grow, so will you. We believe that our company provides an important opportunity for people to expand their skill set and make their mark.

We have very high standards for our work and our investments are for the long term. This philosophy is reflected in our hiring process. We work hard to find the right fit and as a result we have a team of high performing, motivated and creative individuals.

The role

We are seeking a team-oriented **Associate - Client Services** to join our Wealth Management business. This role directly impacts the client experience and is key to the efficiency and success of the Wealth Management Services team. The Associate - Client Services collaborates with advisory members in a client-focused environment utilizing exceptional organizational, communication, execution, and problem-solving skills. The successful candidate will learn the wealth management business, products, and technology in order to assist Wealth Advisors in providing an exceptional client service experience.

Essential Duties

- Responsible for excellent and consistent client experience.
- Document client action items in client relationship management (CRM) tasks and coordinate assignments and progress with client management team. Take the lead to follow-up and ensure client-related goals and milestones are delivered on time.
- Provide proactive and regular updates to advisors and clients on the status and timing of their service requests.
- Provide clear, timely, and professional verbal and written communications with clients, and third-party affiliates, demonstrating excellent tact, courtesy, and subject matter expertise.
- Onboard new client relationships - take ownership of complete client and account setup process at the custodian(s) and in the following internal systems: CRM, reporting and billing, client portal, compliance, and electronic files. You will establish new accounts at custodian(s), coordinate asset transfer(s) including cost basis, and prepare all required Litman Gregory agreements and authorization forms.
- May join client meetings, especially when onboarding new clients and providing recommendations about service solutions.

- Subject matter expert to advisors and clients on rules of account types and ownership structures (trusts, IRAs, endowments, and other account types), and requirements to set up each type of account without administrative or procedural error.
- Subject matter expert in navigating custodian relationships (Schwab and Fidelity) with ability to make recommendations to new clients on differing features/benefits between custodians.
- Serve as primary client contact for all account, cash flow servicing issues and other client wealth management-related requests.
- Contact and respond to clients' requests for portfolio information, investment performance and cash distributions.
- Coordinate the generation of custodian report requests for clients, update client specific spreadsheets, prepare audit request responses and create custom reports by compiling data from various sources. This may include gathering and coordinating data from clients and internal departments.
- Process account contributions and distributions (checks, wires, journals, ACH transfers, gifts of securities, and IRA distributions including RMDs). Establish and maintain custodian and trading-program instructions for recurring money movements. Assist advisors with cash verification process.
- Maintain accurate client information and settings at custodian(s) and in CRM including, but not limited to:
    - Account registration and/or signer changes
    - Performance strategy changes
    - Beneficiary designations changes, address changes and other account maintenance requests
    - Account closures and client terminations
- Provide administrative assistance to Advisors in support of activities to gain new clients. May assist with client marketing proposals/collateral, financial planning process, and trade requests.
- Participate on project teams as needed to support initiatives of the Wealth Management Services team or overall company.
- Work closely with Operations, Private Funds and Compliance teams

Qualifications

- Minimum 2 years of experience in client service and operations roles with an investment advisory firm preferred
- Enthusiastic and positive approach to client service and problem-solving
- Proven track-record of team collaboration and best-practice information sharing
- Excellent written and verbal communication skills
- High degree of individual initiative and job ownership to achieve goals without close supervision
- Excellent organizational and time-management skills; ability to multi-task and reprioritize work on an ongoing basis
- Excellent attention to detail and high quality of work
- Excellent computer skills with experience in CRM (i.e., Microsoft Dynamics) and client reporting/billing/portal system (i.e., Tamarac).
- Proficient in MS Office including Word, Excel and PowerPoint.
- Bachelor's Degree preferred

Location

This role will be based in one of our Northern California offices (Larkspur, Stockton, Walnut Creek)

Litman Gregory and iM Global Partner are equal opportunity employers. We celebrate diversity and are committed to creating an inclusive environment for all employees. Litman Gregory and iM Global Partner encourage applications from people of all races, religions, national origins, genders, sexual orientations, gender identities, gender expressions, and ages, as well as veterans and individuals with disabilities.

If you are ready to join a team focused on excellence and ready to reap the rewards that come with it, then we invite you to apply with your resume and a short cover letter to **recruiter@lgam.com**