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

The entry-level **Associate - Client Service** delivers high quality client service support that helps ensure an exceptional customer experience for Wealth Management clients, prospects, and guests. This position provides a wide range of client service support including helping Advisors and Client Service Associates with client and prospect meeting preparation, setting up and orienting clients and prospects to Litman Gregory’s client portal, coordinating special client acknowledgements, updating data in the CRM, performing daily operations such as handling phones and email, processing mail, updating various internal systems, and assisting with special projects.

This position is essential to the efficiency and success of the Wealth Management Services team. In this role you will collaborate closely with Advisors and Client Service Associates in a client-focused environment utilizing your exceptional organizational, communication, and execution skills. The successful candidate is passionate about serving clients and learning the Litman Gregory wealth management business in order to support Wealth Advisors, clients, and prospects at increasingly high levels.

Essential Duties:

- Responsible for supporting an excellent and consistent client experience
- General client service and office administration responsibilities, including but not limited to:
    - Answering phones
    - Mail processing
    - Proxy processing
    - Client/prospect meeting coordination and support
    - Coordinating and processing client gifts and acknowledgements
    - Helping maintain and post various templates and client-deliverables for team utilization
    - Helping ensure sufficient inventory of supplies
    - Helping coordinate other on-site office needs
- Assist Advisors and Client Service Associates as needed with Client and Prospect Meeting Support, i.e.
    - Scheduling client and prospect meetings
    - Contacting clients and prospects to confirm meeting times
    - Establishing client-meeting activity records in CRM for advisor meeting notes and delivering to advisor in advance of meeting
    - Maintaining client-meeting fields in CRM and conducting periodic client-meeting planning meetings with Advisors as needed
    - Preparing client meeting materials for client delivery
- Setup and help support Litman Gregory client portal accounts for clients/prospects/affiliates
    - Establish new accounts and send portal welcome email
    - Provide on-request user support and check-ins for new users
    - Post and retrieve documents to/from Litman Gregory portal accounts as requested
- Create and help maintain client data in client relationship management (CRM) databases including, but not limited to:
    - Provide overflow support adding new contacts (prospective clients, affiliated professionals, etc.) to CRM
    - Provide overflow support adding and updating opportunity and activity records in CRM
    - Support other CRM data-review projects for Wealth Management Services team
- Run and create client related reports from various databases
- Assist with client service projects
- Work with operations and compliance teams as well

Qualifications

Essential

- Excellent attention to detail and high quality of work
- 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 prioritize work on an ongoing basis
- Proficient in MS Office including Word, Excel and PowerPoint.

Desirable

- 2 years of experience in client service and operations roles with an investment advisory firm preferred
- Excellent computer skills with experience in CRM (i.e., Microsoft Dynamics) and client reporting/billing/portal system (i.e., Tamarac).
- 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**