May 2023

About the job

About Litman Gregory and iM Global Partner

Founded in 1987 and based in the San Francisco Bay Area, Litman Gregory offers its services to individuals, families, and endowment and foundation organizations. Now a part of iM Global Partner, a worldwide asset management network, Litman Gregory Wealth Management benefits from a global network of professionals in 12 locations worldwide. Our relationships are built on trust, respect, and integrity and 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. We believe that **'Performance is born out of people'** and that is clearly the case for our team of hard-working, motivated employees.

The role

The part-time (30 hours/week) **Associate - Client Service & Administration *(Temporary)*** delivers high-quality support that helps ensure an exceptional experience for Wealth Management clients and colleagues. This position provides a wide range of administrative support including helping Advisors and Client Service Associates (CSAs) with client and prospect meeting preparation, coordinating special client acknowledgments, updating data in the Customer Relationship Management (CRM) database, performing daily operations such as handling phones and email, processing mail, updating various internal systems, and assisting with various projects. In this role, the Associate will collaborate with team members in a client-focused environment utilizing excellent organizational, communication, and execution skills.

Based on business need, this non-exempt role is to be performed on site; this is not a remote or hybrid role. This is a temporary position that will last 3-6 months.

Main Responsibilities

- General client service and office administration responsibilities, including but not limited to :
    - Mail processing.
    - Proxy processing.
    - Answering phones.
    - Client/prospect meeting coordination and support.
    - Coordinating and processing client gifts and acknowledgments.
    - Posting and retrieving documents to/from client portal accounts
    - 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.
- Create and help maintain client data in CRM including, but not limited to:
  - Providing overflow support by adding new contacts (prospective clients, affiliated professionals, etc.) to CRM and adding them to mail lists.
  - Providing overflow support adding and updating opportunity and activity records in CRM.
  - Supporting other CRM data-review and update projects for the Wealth Management Services team.
- Assist Advisors and CSAs as needed with client and prospect meeting support, such as:
  - Contacting clients and prospects to schedule and confirm meeting times as needed.
  - Maintaining client-meeting fields in CRM and conducting periodic client-meeting planning meetings with Advisors as needed.
  - Preparing client meeting materials for client delivery.
  - Assisting with general meeting setup as needed.
- Run and create client-related reports from various databases.
- Assist with various client service projects.
- Work with Operations, Private Alternative Investments, and Compliance teams as needed.
- Provide overflow support for general office administration needs.

Qualifications

Essential

- Excellent organization, time management, and follow-through skills.
- Excellent customer service skills via phone, email, and in-person, demonstrating professionalism, careful listening, friendliness, and eagerness to serve.
- Strong attention to detail and job ownership.
- Strong computer skills and quick learner of new technology.
- Ability to learn and master internal policies and procedures.
- Experienced self-starter with initiative and problem-solving skills
- Team player, collaborative, able to work effectively with others
- High level proficiency in Word, Outlook, Excel and PowerPoint

Desired

- Flexibility to commute 2-3 days a month to Larkspur office (mileage reimbursed)
- Education or work experience in the financial services industry.

Pay Range

$25/hr - $32/hr, plus mileage-based commute subsidy
Exact compensation may vary based on skills and experience.

Location

The role will be based in our Walnut Creek, CA office

Reporting Lines

This role reports to SVP – Client Service Operations.

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 withdisabilities.

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.
Send to: us-recruitment@imgp.com . Please indicate the job title in the message subject line.