RonaldBlueTrust™

Client Service Associate

This position is located at our Houston, TX office which is located at:
952 Echo Lane, Suite 190, Houston, TX 77024

About Us

With nationwide capabilities, Ronald Blue Trust provides wealth management strategies and trust services based on biblical principles to help clients make wise financial decisions, live generously, and leave a lasting legacy. With over $8 billion of assets under management and advisement and a network of 13 branch offices, we serve over 7,000 clients * in all 50 states through four distinct divisions and offer services across the wealth spectrum in these key areas:

- Financial, retirement, and estate planning
- Investment management and solutions
- Charitable giving strategies
- Personal trust and estate settlement services
- Bill paying services
- Family office services
- Business consulting services
- Institutional client services

** As of 09/30/17 and subject to change.*

Position Overview

We are currently seeking a **Client Service Associate** in our **Houston, TX** office who has experience working in a professional environment, is highly organized, and is detail oriented. This individual provides administrative support to team members and clients by performing a variety of complex duties in the areas of client service, office administration, financial planning, investment management, and/or accounting to support advisors and planners in serving and assisting clients.

The Client Service Associate position covers a wide range of responsibilities including but not limited to:

- Initiates and monitors administrative details to serve our firm's clients with excellence, which include but are not limited to:
  - Responsible for all procedures and follow-up necessary to service investment accounts (e.g., processing applications, deposits, withdrawals, and transfers; collating and mailing Quarterly Investment Reviews; and generating various investment reports as needed)
  - Prepares requested client, branch, or investment reports and spreadsheets in a timely manner
  - Transcribes or composes routine correspondence and emails with speed and accuracy and in keeping with the highest business standards
- Works in conjunction with supervisor to initiate and organize meetings and respond to client inquiries regarding actions taken to accomplish goals:
  - Coordinates scheduling of team appointments, meetings, and travel arrangements; greets team's visitor(s) or client(s)
  - Proactively plans for and responds to urgent needs
- Executes all functions necessary to maintain accurate electronic database of prospect and client information in accordance with compliance guidelines and regulations, including

maintaining well indexed and up-to-date electronic file systems for correspondence, reports, and reference material as well as confidential and non-confidential material:
    - Gathers, records, and processes pertinent information from clients or financial institutions for record maintenance or further analysis by other team members
    - Exercises personal integrity and ability to discreetly handle confidential data
- Processes quarterly billing, generates invoices, and maintains updated Client Income Projection report in an active and timely manner
- Maintains the highest Compliance standards by adhering to the firm's Human Resources policies, Compliance policies, professional designation standards, and our industry's regulatory standards to mitigate risk to the firm

Desired Qualities and Skills

The successful candidate will possess the following:

- Demonstrated excellent computer literacy/skills and knowledge of specialized office programs, including strong proficiency within Microsoft Office products, specifically Microsoft Excel and Word
- Demonstrated knowledge of file management principles and, with assistance from internal training resources, demonstrated competency in utilizing firm-specific software applications
- Excellent communication skills with ability to organize and express thoughts clearly and concisely in both speaking and writing
- Adeptness at prioritization and proactive planning with ability to complete multiple time-sensitive tasks, responding to urgent needs
- Personal integrity and ability to discreetly handle confidential data
- Aptitude and passion for learning new things quickly with a strong work ethic in an ever-changing environment
- Capability to excel in a team environment as well as working independently
- Desire to serve clients and co-workers with excellence
- Proven strong technical and analytical skills
- Strong business mathematical skills and keen attention to detail
- Strong organization skills and systems acumen

A bachelor's degree in Management, Business, Finance, or Accounting or related field is preferred. A minimum of three (3) years' prior experience in a support role in administrative support, customer service, or accounting in a financial, investment, banking, or accounting firm is strongly preferred. The successful candidate will be comfortable in a fast paced environment that requires flexibility and responsiveness. Priority will be given to local candidates.

How to Apply

Please visit the Careers page of www.ronblue.com to submit your resume and cover letter. Prior to applying for this position, please visit www.ronblue.com and review it thoroughly. Should you decide to apply, make sure to include a cover letter which includes your answers to all of the questions requested on the application page. **NOTE**: To be considered a candidate for our firm you **MUST** provide a cover letter. Once you have applied for this position, please add ronblue.com to your email's spam filter whitelist/safe senders list. This setting is often found in your email account under Mail / Options. This will ensure that any correspondence from us will be received by your email inbox.