SUMMIT HILL | WEALTH MANAGEMENT

JOB DESCRIPTION: CLIENT SERVICE ASSOCIATE

Would you describe yourself as a finance "nerd" who likes people? Do you want to be a part of a team culture that is humble, hungry and smart? Are you looking for an opportunity with an entrepreneurial, growing firm? If so, read on.

THE ROLE:

The Client Service Associate will help us deliver excellent service to clients and support. You will support the Managing Partner in financial planning, investment management, and delivering outstanding client service. The role requires someone who has fantastic communication skills and likes talking to customers, a desire to learn about and grow in the financial services industry, and a passion for personal development. Initially, you will not need a securities license, but in order to grow in this role, and eventually, with the firm, you will need a Series 65, CFP and possibly a CFA. This is *not* a sales role. This position allows the Associate to gain valuable experience in wealth management, develop their communication and analytical skills, and progress toward more client interaction and responsibilities.

This role requires frequent communication with the Managing Partner, Operating Partner, our clients, and our custodian. The ideal candidate will be positive, organized, detail-oriented, motivated and have the ability to change course quickly.

RESPONSIBILITIES:

- Work with clients and colleagues to ensure proper account opening procedures and documentation
- Schedule and prepare for client meetings; enter and maintain client data in financial planning and portfolio analysis software, prepare reports and other deliverables
- Maintain thorough notes from client meetings; manage projects related to financial planning, investment policy statements, and other deliverables
- Assist with day-to-day client service requests; proactively resolve clients' issues and concerns
- Administrative duties such as handling telephones, mailing, filing and processing forms
- Comply with all industry rules, regulations and firm policies

EDUCATION, KNOWLEDGE & SKILLS:

- Bachelor’s Degree Required; Finance or Business degree preferred
- Proficiency in Microsoft Word, Excel & PowerPoint
- Excellent attention to detail, solid follow-up skills, and the ability to think strategically and solve problems
- Superior interpersonal, organizational and client service skills; work effectively in a highly collaborative team environment
- Skilled at planning, organizing, prioritizing and executing simultaneous projects and activities; proven ability to work under pressure and adapt quickly to change
- Strong computer skills; ability to quickly learn new software
- Intellectual curiosity and a sense of humor

Summit Hill Wealth Management is a fee-only RIA located in Denver, Colorado. We believe that wealth is most meaningful when it aligns with one’s values, is used to care for family and loved ones, and makes a positive impact in the world.

To apply, please send a resume and cover letter to mwalters@SummitHillWealth.com.