Associate Client Relationship Manager

Retirement Plan Services & Private Wealth Management

The Associate Client Relationship Manager role at EMBREE FINANCIAL Group (EFG) supports various aspects of client coverage at the firm encompassing both sides of the EFG business. Candidates should expect to work directly with the EFG team throughout the entire lifecycle of the relationship, including, but not limited to, client on-boarding, preparing client materials, goals-based financial planning, performance reporting, data management and ongoing service of the client relationship based on each client's unique needs and objectives. This position also requires relationship building with strategic partners (Schwab, Fidelity, Vanguard, etc.) across the firm's businesses.

JOB RESPONSIBILITES:

- Manage client onboarding process, including data collection and data management in the firm's key systems
- Prepare account opening documentation, and follow through with custodian/Recordkeeper to monitor progress of client's account setup and asset transfers
- Schedule and assist in preparing RPS & PWM client reviews & employee education
- Prepare documentation and presentation material required for client reviews
- Work closely with investment custodians and/or vendors to ensure accuracy and timely implementation of client documentation
- Maintain firm CRM system, including inputting necessary client notes and assigning action items
- Prepare reports/materials for new business development and prospect pipeline
- Understand firm's financial planning process, software, data collection, data input, budgeting, cash flow analysis and forecasting, etc.
- Leverage Recordkeeper/custodian websites to assist clients and plan sponsors
- Understand performance reporting software and generate reports as needed
- Liaison between accounts payable and strategic partners

SKILLS & QUALIFICATIONS:

Communication:

Excellent presentation skills, ability to present your ideas to the rest of the wealth management team as it relates to financial plans, performance reporting and/or investment modeling.

Writing:

Strong email skills as well as the ability to create written content, both external and internal.

Flexibility:

Strong ability to multi-task. For example, must be agile at prioritizing multiple demands from clients and EFG team at the same time.

Investment Acumen:

Familiarity with investment nomenclature & analytics, with the ability to learn modeling.

Other prerequisites:

- Four-year college degree with emphasis in economics or business (or equivalent work experience)
- Strong MS Office skills
- Basic understanding of Financial Planning

Compensation:

$40 – 50K annual compensation, depending on credentials & skills set, plus benefits

To Apply: Send resumes and cover letter to sdavidson@embreefinancial.com