GW&K | INVESTMENT MANAGEMENT

**Title:** Client Service Associate
**Department:** Client Service

**Summary**:

The Client Service Associate acts as a liaison between the client, portfolio manager, custodian and the operations department.

**Responsibilities:**

- Respond and resolve client requests/inquires on a timely basis
- Monitor new accounts, set-up, closing accounts, and transfers
- Oversee and review account performance, cash outflows and inflows
- Monitor asset allocation, cash balance, overdrafts, and investments
- Responsible for upkeep of client's permanent file
- Research performance issues
- Cash management
- Run daily, weekly, monthly reports
- Prepare and follow up for client meetings

**Qualifications:**

- Bachelor's degree, preferably in business, finance or economics
- 2 years of industry experience, preferably with prior Private Wealth end-client exposure; CFA candidates preferred
- Must be detail oriented, possess strong organizational skills and work well under pressured time constraints while meeting strict deadlines
- Must be able to work well with all levels of management, possess good interpersonal skills, work independently and prioritize while handling several tasks at once
- Ability to communicate and perform in pressured situations in an efficient and professional manner
- Must demonstrate an ability and eagerness to learn about the financial industry as well as the particular philosophies and investment strategies of the company
- Must possess a curiosity for learning and improving upon all aspects of the position including technological and organizational strategies
- Must be proficient in Microsoft office applications, including Word and Excel