

## CLIENT SERVICE ASSOCIATE

Reynders, McVeigh Capital Management, LLC is a Boston-based wealth management firm focusing on ESG analysis and social impact for its nearly \$2.75 billion in assets, seeks a client service associate to join our team. This position will work closely with portfolio managers, the operations team and other client service team members to ensure that our clients receive the highest level of service and an exceptional client experience.

### Core Responsibilities

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- Coordinate the opening and on-going maintenance of client accounts, while carefully following through on client tasks through completion.
- Ensure that client requests are completed promptly and accurately. Follow up effectively with Portfolio Managers on open account issues.
- Establish strong working relationships with fellow client service team members and colleagues across the organization.
- Process disbursements and contributions to and from client portfolios, coordinate paperwork when necessary. Act as a resource for clients and portfolio managers to ensure secure, timely distributions.
- Assist with on-going charitable donations of cash and stock from client portfolios to various organizations.
- Coordinate internally, as well as with clients, regarding account and client updates.
- Work with accountants and other third parties to ensure documents and related payments are submitted appropriately.
- Ensure that all associated communications are properly documented in the Firm's CRM.

### Qualifications

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- ✓ Bachelor's degree required
- ✓ Proven financial services client service experience required
- ✓ Excellent organizational skills and the ability to perform multiple tasks concurrently with superior attention to detail
- ✓ Strong interpersonal and communication skills to interact with clients, members of the firm and outside contacts
- ✓ Interest in ESG investing a plus
- ✓ Proficiency in leveraging systems and processes to execute activities with accuracy and efficiency
- ✓ Technology focused; expertise in Microsoft applications required
- ✓ Experience with Client Relationship Management (CRM) software; Salesforce preferred
- ✓ Experience with Advent Software products a plus

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### Benefits & Applying

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Salary will be negotiated, based on experience. Reynders, McVeigh provides a generous benefits package to all full-time employees, including medical, dental and disability insurance, as well as employer contributions to retirement and health savings accounts.

Please share your interest in this position by sending your **resume and a cover letter** to [careers@reyndersmcveigh.com](mailto:careers@reyndersmcveigh.com).

In order to provide equal employment and advancement opportunities to all individuals, Reynders, McVeigh does not discriminate in employment opportunities or practices on the basis of creed, status as a veteran, ancestry, race, color, religion, sex, gender identity or expression, genetic information, national origin, age, disability/handicap, sexual orientation or any other characteristic protected by law. This policy governs all aspects of employment, including selection, job assignment, compensation, discipline, termination, and access to benefits and training.

Reynders, McVeigh will make reasonable accommodations, when requested, for qualified individuals with known disabilities who can perform the essential functions of their positions, unless doing so would result in an undue hardship.