

Client Service Associate

Fresh Pond Capital, a division of Reynders, McVeigh Capital Management, LLC (“RMCM”), is a wealth management practice focused on sustainable investing to improve our world. Fresh Pond Capital provides tailored financial advice to socially-minded individuals and families with high net worth portfolios. We help clients align their financial assets and personal values so they may advance social change and spark community action while earning investment returns. We value the contributions made by team members and recognize that our success is rooted in collaboration and conducting ourselves with the highest ethical standards.

We are seeking a full-time Client Service Associate to work in our office in Boston’s financial district.

Responsibilities include:

- Providing client service support for existing relationships, including processing financial transactions.
- Managing and executing the onboarding process for new clients.
- Preparing materials for client meetings and calls.
- Documenting and communicating account and client updates.
- Providing information to clients’ accountants, lawyers, and other interested parties, as needed.
- Organizing meetings and managing calendars, including Managing Director’s appointments.
- Coordinating mailings and special projects with the Managing Director.
- Supporting the firm’s internal sustainability initiative as part of a committee.
- Filing shareholder resolutions and communicating key information to clients and the firm.

Qualifications:

- Previous client service experience (at least 2 years), preferably in financial services industry.
- Ability to learn and understand internal systems and custodial processes.
- Comfort with multi-tasking and managing deadlines.
- Strong communication skills and interest in developing rapport with clients.
- Motivation to contribute to a team effort and work collaboratively with others.
- Expertise with Microsoft Outlook, Word, Excel and PowerPoint, required.
- Experience with a CRM, required.
- Previous exposure to Advent Software products, a plus.

Members of the Fresh Pond Capital division are employed by Reynders, McVeigh Capital Management, LLC. Salary will be negotiated, based on experience. Comprehensive medical, dental and retirement benefits are included.

Please share your interest in this position by sending your resume and a cover letter to Ashley Lyons, Senior Operations Manager alyons@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.

The position will remain open until filled, and applications will be considered as received.