

## Portfolio Associate, Boston Office

*Trillium Asset Management, LLC is the oldest investment advisor exclusively focused on sustainable and responsible investing (SRI). We believe that environmental, social, and governance (ESG) factors play an integral role in the investment process, which can lower portfolio risk and help identify the best-managed companies.*

### Job Summary

The Portfolio Associate will provide support to the Investment Management Team in Boston office. This position requires someone who is a technology leader, is very organized, has superior attention to detail, can work both independently and as a team player, and can handle multiple responsibilities.

### Duties and Responsibilities

- Assist in all aspects of client service
- Coordinate the opening and on-going maintenance of client accounts, while taking ownership of client tasks through completion
- Ensure client requests are completed promptly and accurately
- Follow up effectively with Investment Managers on any account needs or issues
- Prepare and process client paperwork and materials for client meetings
- Prepare client trades for Investment Manager review
- Other high-level administrative, client, and firm projects

### Qualifications

- Minimum Bachelor's Degree
- 3-5 years in a financial services client service type role
- Must have excellent organization skills and be able to perform multiple tasks concurrently with superior attention to detail
- Must be technology oriented and an expert in all Microsoft applications, with proficiency in leveraging systems and processes to execute activities with accuracy and efficiency
- Strong interpersonal and communication skills. Candidates must be able to effectively communicate verbally and in writing with clients, members of the firm and outside contacts
- Ability to establish strong working relationships with client service team members and colleagues across the organization, and to take initiative to develop team members
- Strong math, analytical, and decision-making skills are required
- Desire and ability to work successfully in a small growing company environment

### Compensation

Trillium Asset Management LLC provides a generous compensation package that includes 401(k), profit sharing plan, group life, long-term disability, health, dental, and vision insurance benefits, paid time off and performance-based bonus program.

**We will only consider applications with an attached professional resume and cover letter.**

Please email: [mmcdonough@trilliuminvest.com](mailto:mmcdonough@trilliuminvest.com)