

Position Description

Title: Client Relations Manager

Status: Full Time

Start Date: Immediate

Location: Silicon Valley/Scotts Valley, CA

Company Overview

This fast-growing, focused investment management firm has over \$5 billion under management and a top-tier investment record. Company growth enables ample career advancement opportunities for self-starters. For over 30 years, the firm has provided disciplined portfolio management for individuals, retirement accounts, trusts, family offices, corporations, endowments and foundations across separately managed accounts and mutual funds. Portfolios are managed with a strict focus on valuation, margin of safety, portfolio concentration, investment flexibility and long-term perspective.

Job Summary

The Client Relations Manager works directly with firm clients to address a variety of needs. This individual has exceptional interpersonal skills, an aptitude for financial and investment concepts, and the ability to earn the confidence of high net worth clients.

Duties and Responsibilities

The Client Relations Manager can expect to focus in areas including:

- Portfolio consulting to determine investment allocation across proprietary products
- Reviewing client performance, needs, goals, and objectives
- Ability to talk about portfolio holdings in depth
- Ability to garner additional client assets where appropriate
- Servicing day-to-day client needs
- Gathering client data and documenting accounts
- Drafting correspondence and needs summaries
- Researching items relevant to client financial needs

Qualifications

The Client Relations Manager position typically requires the following qualifications:

- A minimum of 5 years experience preferred, ideally in financial services industry
- Excellent interpersonal and communication skills, both written and oral
- Aptitude for financial and investment concepts
- Intelligent, proactive, well organized, attention to detail, ability to multi-task, keep track of open items
- Desire/ability to work successfully in a small company environment
- Series 65 a plus, but not required

Salary and Benefits

Pay is competitive based on industry standards.

- Compensation will be based on experience
- Benefits include health care, 401(k)

The firm is an Equal Opportunity Employer