



SMITH MOORE

Providing financial advice since 1913

## Client Associate

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### POSITION OVERVIEW

Consider joining Smith Moore, a financial services firm established in 1913, headquartered in Clayton, Missouri with 8 offices in Missouri, Kansas and Illinois.

As a Client Associate, you would provide daily administrative and operational support to well established Financial Advisors as a member of their team. We are looking for intelligent, detail oriented individuals, with great organizations skills, ability to work in a fast-paced environment, and will ensure an excellent client experience.

### POSITION DESCRIPTION

1. Ensure consistent delivery of high quality service to meet or exceed client expectations and service standards.
  - Manage all administrative requirements related to the day-to-day operations of the team.
  - Manage all incoming administrative communication (i.e., calls, e-mails, faxes, etc.) and respond in a quick, efficient manner.
  - Provide quick, effective responses and resolutions to administrative-based client issues.
  - Escalate problems or client issues and bring to the attention of the advisor/team as required.
  - Review and distribute all incoming internal and external correspondences.
  - Monitor individual activities to ensure adherence to policies and procedures, completeness, and accuracy.
  - Ensure your individual work area is kept neat and tidy.
  - Maintain client relationship management systems (CRM).
  - Schedule and prepare the advisor/team for all client meetings and reviews.
  - Assist the advisor/team in delivery of all relevant client service deliverables.
  - Track and request office supplies as required.
  - Ensure the resolution of technical problems with team owned equipment, calling vendor, or technical support staff as required.
2. Help the Financial Advisors achieve their business goals.
  - Understand business goals and the various strategies in place to achieve them.
  - Support ongoing change initiatives and new business practices.
  - Establish and maintain effective partnerships with the advisor/team, colleagues, and business liaisons outside of the office.



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## POSITION REQUIREMENTS

### **Specific Requirements:**

- 2 years of experience in a professional office environment.
- Excellent computer skills with working knowledge of Microsoft Office products.
- Experience with or a working understanding of client relationship management (CRM) software.

### **General Requirements:**

- Enthusiastic, motivated, committed, and a team player.
- Reliable and professional.
- Personable and able to form good rapport with others.
- Good oral and written communication skills.
- Highly organized, good at multi-tasking and able to prioritize activities.
- Process oriented with attention to detail.
- Enjoys routine and administrative work responsibilities.
- Able to work well in a dynamic, fast-paced environment.
- Interpersonal skills to develop and maintain good relationships with advisors, clients, and colleagues.
- Good problem solving skills sufficient to identify a problem, generate solutions, and decide on a course of action at an administrative level.

To apply, send your cover letter and resume to [opportunities@smithmoore.com](mailto:opportunities@smithmoore.com)