VIGILANT Capital Management, LLC

JOB POSTING: Client Relationship Associate

DATE: January 2022

Vigilant Capital Management, a growing wealth management firm with more than $2.2 billion under management, is looking for a Client Relationship Associate to join its dynamic and talented team. This role works closely with the senior Wealth Advisor to deliver the Firm's wealth planning value proposition to clients who are high net worth individuals and families. This position is a great steppingstone into a senior administrative or wealth management career and will involve assisting with the creation of wealth planning presentations, communicating with clients, colleagues and other professional advisors.

This role will be based out of our Portland, Maine office. Vigilant is a hybrid work environment with a combination of working in the office and from home. There could be occasional travel to the Portsmouth, NH office.

ESSENTIAL JOB FUNCTIONS:

- Direct support of senior Wealth Advisor(s) and their book of business
- Ensure the Wealth Advisor is prepared for client/COI/prospect meetings on a daily basis
- Assist with the creation and updating of client wealth plans, prepare presentations and other paperwork as needed
- Actively participate in onboarding of new clients, prepare account opening documents, talk the client through the account signing process, explain the documents as needed
- Process internal and external account opening paperwork, ensure all necessary documents are obtained and reviewed for accuracy, submitted and properly executed, as well as captured on the network; update or replace client documents ongoing as needed
- Handle transactions related to client accounts, including requests for money movement, contributions, distributions, and other account maintenance needs
- Interface with Schwab Institutional, downloading and uploading forms, monitoring and verifying changes in the system, resolving issues, staying current with changing processes and procedures
- Interact with professional advisors, including CPA, Estate Attorney, Insurance Agent, others
- Input and track client related data, ensure consistency/integrity across all technology platforms
- Aid in client retention by providing exceptional customer service, track and monitor client service standards to ensure appropriate activity, prompt action as needed
- Send and receive emails, create mail merges as needed, post documents to the client portal
- Calendar management, schedule and organize activities, meetings, coordinate travel needs
- Prepare and submit expense reports, review credit card transactions against receipts, track expenses
- Direct and indirect interaction with clients/prospects/COIs
- Proactively monitor publications to identify prospective clients and discover information about existing clients, locate opportunities for marketing events, attend offsite events as appropriate
- Thoroughly understand and implement firm compliance responsibilities
- Play an active role in various firm committees and engage in bi-weekly CRA team meetings – prepare and contribute thoughts for agendas, raise concerns, suggest solutions, look for and implement efficiency and process improvement
- Other miscellaneous tasks and responsibilities, where the above list is not intended to be all-inclusive

KNOWLEDGE, SKILLS AND ABILITIES:

- Proficient in Microsoft Office suite, including word processing, spreadsheets, and presentations
- Knowledge of or an aptitude for learning the Tamarac Suite (CRM and portfolio accounting software), Microsoft Teams and Schwab Institutional website
- Excellent interpersonal skills and professionalism
- Strong oral and written skills
- Well-developed presentation skills
- Meticulous attention to detail, particularly as it relates to composing, typing and proofing materials
- Ability to effectively manage time, establish priorities, meet deadlines and multi-task in a fast–paced environment
- Resourceful, analyzing and solving problems in a self-reliant, proactive manner
- Ability to work both in a team-oriented environment and independently
- Ability to adeptly handle confidential information and sensitive situations - position continually requires discretion, tact and diplomacy
- Ability to work beyond standard office hours and attend offsite events, as necessary, while properly managing and accounting for work time
- Ability to travel between offices, typically in Maine and New Hampshire

EDUCATION AND EXPERIENCE:

- College Degree or equivalent is a plus
- Minimum of 2 years administrative experience or in a support role
- A background in finance, whether educational or through direct work experience, is required
- Experience with CRM related software is a plus
- Experience with schwabinstitutional.com is also a plus

WHY WORK AT VIGILANT CAPITAL MANAGEMENT:

- Fantastic office locations in downtown Portland, ME and Portsmouth, NH
- Very competitive salary and bonus plan
- Excellent benefits
    - Employer-paid employee health insurance
    - HSA contribution
    - Employer-paid employee dental and vision plan
    - Employer-paid life and disability plans
    - Profit-sharing contributions, with exclusive company-managed investment option
- Generous PTO plan
- Support for professional designations and continuing education
- Bi-annual company events
- …. And more

NO PHONE CALLS OR RECRUITERS PLEASE

Vigilant Capital Management is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, sexual orientation, gender identity, national origin, disability, veteran status, or any other status protected by law.