NOVARE
CAPITAL MANAGEMENT

# Client Service Associate

**Novare Capital Management** is a privately owned investment management firm that uses a comprehensive approach to serving our clients by providing investment management, financial planning, estate plan review and family financial education services. Our team has extensive experience and industry knowledge as well as several prestigious designations including CFP®, CFA®, MBA, JD, and ChFC® providing the candidate with a strong career development resource and mentoring framework.

**Position:** Cross-functional client service professional providing support to wealth management team. Position provides candidate with the opportunity to participate in several disciplines of a boutique RIA firm. We look for the candidate to help us sustain our high standard of excellence. Responsibilities include:

**Client Service and Operational Support**

- Establishment and execution of new client accounts and continuing account maintenance including transaction requests providing quality, accurate and timely service.
- Utilize relevant internal technology solutions to effectively manage client requests ensuring client expectations and deadlines are met.
- Generate client presentations and quarterly performance reporting implementing established protocols and procedures.
- Contribute to strategic planning and exchange of ideas to develop enhanced best practices.
- Assist in production of composite reporting and required SEC filings.
- Various administrative tasks including telephones, mailings, and processing forms.

**Financial Planning and Wealth Management**

- Contribute to the development and implementation of client financial plans in support of Relationship Managers.
- Participate in client meetings providing technical support. Assist Relationship Managers with the implementation and monitoring of meeting deliverables.
- Update and maintain marketing materials and presentations.

a trustworthy partner every step of the way.

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### Qualifications

- Bachelor's degree and 3-5 years' experience in the financial services field, CFP® or CFP® candidate preferred.
- Strict attention to detail with ability to see projects and open issues through to resolution.
- Quick learner with ability to interact in a professional manner at all levels both internally and in client facing role. Superior multi-tasking and organizational skills.
- Strong computer skills including proficiency with Microsoft Office Suite, CRM, financial planning and portfolio management software.
- Ability to work independently. Demonstrates critical thinking skills and ability to effectively prioritize and troubleshoot.
- Team player who desires to work in a small entrepreneurial environment and is willing to assist in all aspects of an RIA firm.
- Excellent interpersonal communication skills and ability to build and develop client relationships. Good judgement and discretion while working with highly confidential information.

### Compensation and Benefits

- Competitive salary with a performance based bonus program
- Health Savings Account and company subsidized health insurance plan
- 401(k) Plan with company matching
- Profit Sharing Plan

**Please submit resume and cover letter to:**
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