VERIS | Wealth Partners

Values. Wealth. Sustainability.

New York
San Francisco
Portsmouth

www.veriswp.com

Client Services Associate 1

San Francisco, California

Company Summary

Veris Wealth Partners is a leading impact wealth management firm. Founded in 2007, Veris serves individuals, families and foundations seeking market performance and social gain by aligning their wealth with their values. Veris delivers comprehensive wealth management, including investment management, trust and philanthropic strategies, with an emphasis on impact and sustainable investing.

Veris is a proud B Corp and Best for the World® Overall Honoree (2019, 2018, 2017, 2016, 2015, 2014, 2013).

Veris has offices in New York City, San Francisco, Portsmouth, NH, and Boulder, CO. For more information, please visit our website: www.veriswp.com.

Position Summary

The Client Services Associate 1 (CSA1) provides support to clients and prospective clients, Client Service Associates, Associate Wealth Managers, Wealth Managers, and Senior Wealth Managers. The CSA1 will gather and maintain client data, field and respond to basic client requests and service needs, serve as primary inbound call support, schedule client meetings and support client meeting preparation and follow-up. The CSA1 will also support onboarding of new clients.

The CSA1 will be comfortable with the service and investment needs of target clients (including but not limited to high-net worth individuals, families and family foundations) and their wealth management needs.

Essential Functions

- Provide primary greeting and support for in-person visitor as well as phone calls, screen calls and try to resolve first, process daily mail and filing as needed
- Prepare and process Veris paperwork to establish a new client relationship and prepare and process custodian paperwork to setup new accounts, add account features, and transfer assets, performance reporting set-up
- Prepare materials for client account reviews and prospective client meetings, prepare and process client account forms. Support all meeting follow-up as appropriate
- Assist with client requests: information, reports, wires, incoming & outgoing check processing, journals, tax document support, etc.
- Follow-up with service providers to ensure accurate and timely completion of requests
- Maintain all client relationship management (CRM) database and files so they are accurate and up to

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date
- Maintain familiarity with calendars and preferences for impact wealth management team to support efficient meeting scheduling and support
- Update asset allocation spreadsheets and monitor ongoing transaction activity and performance of client accounts.
- Assist in planning and preparation of materials and presentations for client and other conference calls and meetings
- Trade processing once cleared for trading

Knowledge, Skills, Abilities

- Basic knowledge of investment account types
- Working knowledge of Microsoft Office, Word, Excel, Outlook, and Power Point
- Ability to work in a dynamic environment and be able to manage multiple tasks and responsibilities
- Excellent organizational, communication and computer skills
- Intellectual curiosity and a demonstrated ability to work collaboratively
- Interest in sustainability issues
- Strong client service orientation and aptitude

Education and Experience

- Prefer 1 or more years of experience working in a bank, brokerage or similar financial institution environment
- Experience working with high net worth families preferred
- Associates or bachelors degree preferred
- 1 or more years of experience or high level of interest in Sustainable, Responsible, and Impact Investing preferred

Physical and Mental Requirements

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. The firm will provide reasonable accommodation as needed.

- Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
  - While performing the duties of this position, the employee is regularly required to sit, talk, hear, observe, type, see, use hands to finger, handle, or feel; bend or stoop; reach with hands and arms. Limited walking
  - Work infrequently requires limited walking.

Compensation and Benefits

Compensation will be determined by a number of factors including educational background and experience. Veris Wealth Partners has a generous benefits package including health, disability and life insurance, and the opportunity to participate in the firm's 401k retirement plan.

Application Instructions

To apply, please submit your resume, and a cover letter outlining your specific interest in this opportunity to Margie@newlevelresources.com with *SF Veris / Client Services Associate 1* and your name written in the subject line. Resumes will be reviewed as received.