Veris Wealth Partners
Client Services Associate
New York, New York

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 and their values. Veris delivers comprehensive wealth Management, including investment management, trust and philanthropic strategies, with an emphasis on impact and sustainable investing.

There is a dramatic growth in the depth of understanding of sustainable practices. Corporations and individuals are viewing their own practices and those of others with new expectations. The business argument for sustainable solutions to global problems is gaining significant traction. This is creating new demands of wealth managers and investment advisors for sustainable wealth management and impact investment solutions.

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

Position Summary

The Client Services Associate (CSA) provides support to clients and prospective clients, Client Service Associates, Associate Wealth Managers, Wealth Managers, and Senior Wealth Managers. The CSA will gather and maintain client data, 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 CSA will also support onboarding of new clients. The CSA will complete money movement and cashiering requests after 3-6 months and approval, and process trades after 1 year and approval.

Additionally, the CSA may review client portfolios and anticipate client needs, support implementation and administration of client portfolios. The CSA may periodically attend client meetings to build relationships, career development or take notes.

The CSA 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.

New York
San Francisco
Portsmouth

www.veriswp.com

Essential Functions

The Client Services Associate (CSA) provides support to clients and prospective clients, Client Service Associates

- 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 when back in the physical office
- 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
- Works on 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
- Review client portfolios, anticipating client needs and attend client portfolio review meetings as needed
- Supports implementation and administration of client portfolios
- Maintain all client relationship management (CRM) database and files so they are accurate and up to 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

Supervisory Responsibilities

- None

Knowledge, Skills, Abilities

- Working knowledge of investment account types and transactions
- Working knowledge of Microsoft Office, Word, Excel, Outlook, and Power Point
- Working knowledge of CRM and performance reporting
- 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
- Broad knowledge developing sustainability and impact investing preferred
- Strong client service orientation and aptitude

Education and Experience

- Prefer 3 or more years of experience working in a bank, brokerage, or similar financial institution environment
- Prior experience working with Wealth Management or Investment Advisory firms preferred
- 2 or more years of experience with Sustainable, Responsible, and Impact Investing preferred
- Certification or college degree in finance, wealth management, financial planning, or related field preferred
- Experience working with high net worth families preferred

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 *NY Veris / Client Services Associate* and your name written in the subject line. Resumes will be reviewed as received.

EEO Statement

Veris Wealth Partners provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, or genetics. In addition to federal law requirements, Veris Wealth Partners complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities.