Client Service Manager | Full Time

ST. LOUIS TRUST
& Family Office

ST. LOUIS TRUST & FAMILY OFFICE works with approximately 60 client families across the country, advising on more than $15 billion of total wealth. We are a multi-family office and trust company that serves multi-generational families with complex family affairs. Our philosophy is straightforward; focus on our clients, put them first and always better our service. We provide holistic, high-touch client service including customized, independent investment management and a full range of family office and fiduciary services. We serve a limited number of clients with substantial wealth in order to maintain very low client-to-employee ratios. Each client family is different, and so are we.

PROBLEM SOLVERS WANTED | Our motivated, talented team is the secret to our success. We are committed to fostering a highly collaborative environment and ongoing opportunities for learning at all levels.

We are seeking new Client Service Managers to join our client service team. This is a great opportunity to work for a growing, successful company in Clayton, Missouri. This position involves frequent communication with clients and includes hands-on work supporting delivery of full-scope client service in the areas of investments, charitable giving, cash flow management, tax planning and estate planning. The role is collaborative with our investment, operations and client service teams. There is potential for advancement upon mastery of analysis and support functions, which will involve client relationship responsibilities.

DESIRED QUALIFICATIONS AND BACKGROUND:

- Bachelor's degree required, business, accounting/finance or legal background preferred
- Excellent analytical skills with high attention to detail
- Self-starter with demonstrated initiative and proven project ownership skills
- Team player experience and mentality; willing to give best effort on full spectrum of tasks ranging from simple/repetitive to complex/challenging
- Strong organizational and multi-tasking abilities to manage numerous projects with different client service teams
- High energy level, strong work ethic, quick learner
- Eager to learn new skills in a variety of financial planning areas

RESPONSIBILITIES MAY INCLUDE:

- Serve as a point of contact for clients and attend periodic client meetings (some travel may be involved)
- Manage and assist with preparation of materials for periodic client meetings including creating, updating and/or reviewing reports such as cash flows, executive summaries, balance sheets, performance reports and net asset summaries
- Draft financial projections/calculations
- Analyze investment performance and research investment options/recommendations
- Review and track client account applications, transfers and directives as needed
- Income and estate tax analysis/planning, with direction
- Assist with preparation of trust and individual tax summaries/payments
- Coordinate with outside custodians, attorneys, tax preparers and other advisors on behalf of clients
- Present materials and explain content during client meetings

PREFERRED SKILLS AND/OR EXPERIENCE:

- Prior experience in a professional services firm, law firm or financial services environment with exposure to investment, financial planning, tax consulting or estate planning disciplines
- Strong critical thinking and problem-solving abilities/resourcefulness
- Excellent verbal and written communication skills
- Advanced knowledge of Microsoft Office, especially Excel
- Experience with Microsoft Power BI, SharePoint and/or Salesforce CRM considered a plus
- Certifications such as CPA, CFP, CFA considered a plus

EXCELLENT BENEFITS INCLUDE:

- Competitive compensation with bonus potential
- 401(k) with Company match
- Generous benefits package available including medical, dental and vision coverage, FSA/HSA and PTO
- Support for professional development through training and certifications
- Company-paid parking