Client Service Associate | 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 Associates to join our client service team. This is a great opportunity to work for a successful, growing company in Clayton, Missouri. The role includes a variety of client team responsibilities and involves hands-on work supporting the delivery of client service, advancing various internal projects and assisting with company-wide initiatives. The Client Service Associate position requires the candidate to collaborate and communicate effectively within and across operations and client service teams and with external parties.

DESIRED QUALIFICATIONS AND BACKGROUND:

- Associate's or Bachelor's degree with business, accounting/finance emphasis or paralegal studies preferred
- Excellent analytical skills with high attention to detail
- Proactive 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:

- 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, net asset summaries and other client specific reports
- Facilitate, execute and/or review a variety of client team requests and transactions including client account applications, trade forms, transfers and directives and related organization and follow through
- Serve as a liaison to external custodians, attorneys, tax preparers and other advisors/vendors on behalf of client teams
- Assist with preparation of trust review documents and tax summaries/payments
- Coordinate, gather and organize tax and estate planning information/documents
- Learn and run various specialized, financial software applications

PREFERRED SKILLS AND/OR EXPERIENCE:

- Prior experience in a professional services or accounting firm, law firm or financial services environment
- Experience with portfolio management systems (Advent, Black Diamond, Orion, Tamarac) and/or Schwab Advisor Center considered a plus
- Exposure to estate structuring concepts
- Strong critical thinking and problem-solving abilities/resourcefulness
- Excellent verbal and written communication skills
- Advanced knowledge of Adobe and Microsoft Office, especially Excel
- Experience with Microsoft Power BI, SharePoint and/or Salesforce CRM 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