Client Service Assistant | 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 a new Client Service Assistant 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 support and office responsibilities and involves hands-on work supporting the delivery of client service. The Client Service Assistant position requires the candidate to collaborate and communicate effectively within and across operations and client service teams.

DESIRED QUALIFICATIONS AND BACKGROUND:

- Associate’s or Bachelor degree considered a plus
- Strong organizational and multi-tasking abilities to manage time-sensitive work across different client service teams
- Proactive self-starter with demonstrated initiative to deliver exceptional service
- Focused on accuracy with high attention to detail
- Demonstrate good judgment with ability to maintain confidentiality and handle sensitive information discretely
- Dependable, flexible and eager to learn new skills
- Team player experience and mentality; positive attitude/approach to work
- Excellent verbal and written communication skills

RESPONSIBILITIES MAY INCLUDE:

Client Team Support

- Compile and prepare client meeting materials including financial summaries
- Facilitate and execute a variety of client team requests and transactions including client account applications, trade forms, transfers and directives with related organization and follow through
- Serve as a liaison to external custodians and money managers for client account maintenance
- Coordinate, gather and organize tax and estate planning information/documents
- Learn and run various specialized, financial software applications
- Regular flow of new and varied projects ranging from simple/repetitive to complex/challenging

Office Support

- Assemble reports and packages for delivery to clients and/or prospects
- Complete scanning and filing
- Prepare monthly client invoices
- Committee support
- Serve as occasional back up to the receptionist

PREFERRED SKILLS AND/OR EXPERIENCE:

- Prior experience in a professional services or accounting firm, law firm or financial services environment
- Advanced knowledge of Office365 and Adobe applications
- Experience with portfolio management systems (Advent, Black Diamond, Orion, Tamarac) and/or Schwab Advisor Center considered a plus
- Experience with Microsoft Power BI, SharePoint and/or Salesforce CRM considered a plus
- Basic knowledge of accounting principles and/or financial terms 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
- Company-paid parking

Apply to careers@stlouistrust.com | stlouistrust.com