PRIVATE WEALTH
SYSTEMS

Client Service Director

The Client Service Director is responsible for providing day to day client support as the primary point of contact to UHNW families and their investment advisors. We are looking for candidates with prior experience in the financial services or family office industry, who can support (and manage) ongoing client relationships as well as assist new customers in on-boarding. A successful candidate will need to be able to:

- Work closely with the clients to understand their needs and objectives.
- Act as client liaison by communicating client requirements with other internal team members (and manage client projects to completion)
- Maintain change and additional feature requests and follow the progress of the technology and /or operations staff in addressing the items.
- Possess a thorough understanding of both the operations and reporting side the company.
- Provide basic client training and respond to client questions regarding the tools and products offered by the company.
- Assist clients with portfolio set-ups to match client specifications.
- Assure that the platform is configured in a manner that meets client needs.
- Build and maintain positive relationship with clients so that a foundation of trust is established.
- Have a willingness to jump in and assist any area of the company to help satisfy client needs.

Qualifications Education:
Bachelor's degree in Finance, Economics, Business Administration or other related field, or equivalent work experience. CFA preferred.

Experience:
Prior experience in financial industry, specifically client services (portfolio administration), and/or client and performance reporting.

Skills:
Must have excellent communication skills, strong verbal and written expertise is required. Multi-lingual is a bonus.

Computer skills:
Working knowledge of PC technologies, including Microsoft Powerpoint, Word, and Excel.
(Must be eligible to work in the US without a visa)