



Position Description

Title: Client Service Associate

Daintree Advisors is a multi-family office and wealth advisory firm created in 2010 by a group of seasoned investment and planning professionals. We guide and empower clients to step back and “See the Forest” so that they can make thoughtful financial decisions for themselves and their families.

Job Summary

The Client Service Associate will support the Operations Manager and Client Advisors with client service and operational responsibilities. The associate will work with Daintree clients, as well as serve in a variety of back-office roles.

Duties and Responsibilities

- Work with multiple teams providing support in operations, client service, financial planning, and investment management services
- Onboard clients (account opening, initial paperwork, and document/records preservation)
- Execute transfers, wires, and cash management requests
- Communicate with custodians
- Interact with clients and clients’ outside advisors
- Support investment team in trading administration
- Responsible for investment reporting and rebalancing, participation in client financial and tax planning, communication with outside advisors, and special projects

Qualifications and Skills

- 2+ years’ experience in the financial services industry; working directly with clients preferred
- Bachelor’s degree from an accredited college or university
- Proficiency in Word, Excel, and Outlook
- Knowledge of Tamarac portfolio and client management software preferred
- Organized, detail-oriented, and multitasking skills
- Client first philosophy
- Good written/verbal communication and interpersonal skills
- Exercise discretion and independent judgment in support of advisors and clients
- Team player, collaborative, and works effectively with others and a variety of different client personalities
- Desire/ability to work successfully in a small company environment, working both from home and in the office as required

Salary and Benefits

This is a full-time, exempt position. Salary will be based upon experience. A full benefits package is available.

Please submit resume and cover letter to Karen Angrisano at kangrisano@daintreadvisors.com

Daintree Advisors is committed to a culturally diverse staff to work and serve clients in an environment where differences are valued and respected. We are proud to be an equal opportunity employer.