Grant Street Asset Management: Client Service Administrator

Why Work for Grant Street Asset Management?

- Grant Street is a 2nd generation employee-owned independent registered investment advisor. We have been working with families, business owners, physicians' groups and not-for-profit institutions as fiduciaries for 29 years.
- We manage over $600 million in assets and have clients across the United States. Our headquarters is in Pittsburgh, PA (Southpointe office park in Canonsburg). A second office is located in Charlotte, NC.
- Our vision is to be our clients' most trusted and relied upon resource for all their financial needs.
- Our vision for our team is to hire, retain and grow the best professionals in the business in a culture of teamwork, friendship, hard work, respect and accountability.
- Firm is embarking on a growth trajectory and transitioning with a 2nd generation ownership team. Significant opportunity for advancement exists for the right candidate.
- Attractive healthcare benefits and profit-sharing plan available for all employees.
- Hybrid work schedule is available.

Job Summary:

This job requires a patient and stable work style and consistency in dealing with repetitive routine. The job demands a cooperative, agreeable and sympathetic listener who gets along with others and enjoys being helpful to them. A customer service, team-oriented focus is of utmost importance. The job requires attention to the details of work, handling then with better-than-average accuracy and with careful attention to the quality of the work. The focus is on working comfortably under close supervision within a stable, secure team. The pace of the job is steady and relatively unhurried, with an inclination to keep doing things the same way unless directed otherwise by a supervisor. Career path towards other areas within wealth management services available for strong candidates.

Job Duties and Requirements:

- Serve as the first friendly team member clients speak to when they call or see when they arrive for meetings.
- Direct incoming calls to appropriate client service, operations professional or advisor; assist client directly as needed.
- Support wealth advisors to produce client communications (emails, letters, etc.) and various reporting documents.
- Administrative functions: office mail/shipping, holiday cards, client communications, marketing-related/social event planning, etc.
- Develop expertise in client CRM system to record details of client meetings and task assignments to team members.
- Workflows will rely heavily on use of technology and software systems. Proficiency in Microsoft Office Suite (word, excel, outlook) is required. Prior use of Tamarac

Advisor View/CRM suite of products desirable. Applicant must be comfortable and capable to quickly learn new software systems.

Professional Skills/Attributes:

- Minimum 2 years of prior experience is desirable
- Applicant should be very detail oriented, highly organized, good at follow-up, and comfortable following procedural workflows.
- Applicant should work well within a team environment.
- Communication with clients demands strong verbal and written communications skills. Correct grammar and punctuation skills as well as prompt and professional follow-up are required.