ASI is Hiring!

Position: Operations & Client Service Specialist
Location: Bend Office

You are collaborative, client-focused, organized, and efficient with a positive, can-do attitude. If you'd like to advance your knowledge in the investment industry and work with a fun, cohesive team, we'd like to meet you!

ASI Wealth Management, a successful investment advisory firm with over $1.4 billion in assets under advisement, is seeking a dynamic Operations & Client Services Specialist to join our team. As a key member of our team, you'll be interacting with and supporting our clients and your co-workers on a regular basis.

This is an excellent opportunity to advance your investment knowledge while working with a team who has an average of 20 years-experience in the financial industry. Our accreditations and certifications include Certified Investment Management Analyst, Certified Private Wealth Advisor®, Investment Management Consultants Association®, Retirement Plans Associate®, CERTIFIED FINANCIAL PLANNER™, and Accredited Wealth Management Advisor™ We are proud to say we have been serving investors for over 22 years. Another bonus – team members have been at ASI, on average, for 12 years – it's truly a great company in which people want to stay.

Are you ready to join our team?

To support this role, we'll be looking for the following skills and job experience:

Required Skill Set

- 2+ years working in financial services office setting preferred
- Strong communication skills + proven customer service skills
- Enjoy working with a professional team and interacting with clients
- Independent worker
- Proficient in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook)
- Intermediate Excel skills

Desired Skills & Experience

- Proficient with portfolio management database
- Proficient in Tamarac software; Reporting, Trading, and/or CRM
- Bachelor's degree in business/finance
- Proficient in Portfolio Center software

Key Job Functions

- Coordinate and execute client service requests
- Client paperwork – existing client needs and new client account documents
- Client account billing management
- Interaction with account custodians
- Maintain portfolio management data, including daily transactions, positions, reconciliations
- Assist with maintaining/updating CRM (client/contact relationship management software)
- Other general administrative duties include filing, scheduling, and handling mail

Employment
This position is full-time, with excellent benefits. Compensation based on experience.

To Apply:
Email cover letter, salary requirements and resume (PDF files only) to:
info@asiwealthmanagement.com