

Title: Client Service Associate

Employer: Riverbridge Partners, LLC

Location: Minneapolis, MN

Job Type: Full Time; Exempt

Company Profile

At Riverbridge, we believe what is true endures—in investments, people and companies. Founded in 1987, Riverbridge manages growth equity investment strategies for institutions, individuals and advisors. Throughout our thirty-year history, Riverbridge has remained an investment centric firm.

Position Description

The Client Service Associate is key in delivering an exceptional client experience. This individual will collaborate with our relationship managers to serve the individual needs of clients and will execute appropriate workflows and related activities in achieving desired objectives. This individual's excellent interpersonal skills will allow them to thrive as an integral member of our team-based service approach. This individual will be able to perform their work with precision and demonstrate a genuine passion in serving our clients.

Duties and Responsibilities

- Organize and prioritize timely and professional response to verbal and written requests from clients
- Collaborate with relationship managers to prepare materials for client meetings and complete follow up activities
- Facilitate onboarding new client relationships including completion of custodial paperwork and internal contracts
- Responsible for interactions with client custodians for completing ongoing account maintenance and requests including cash, stock, and account transfers, and account changes
- Update, maintain, and utilize our CRM system to maximize the client experience through systematically leveraging relevant data
- Prepare client reports and seek ways to improve the production process
- Monitor various reports to identify data quality issues and coordinate resolutions
- Work to improve efficiencies and maintain compliance standards
- Assist in operational marketing functions such as production of RFPs and updating various databases

Position Qualifications

- Understanding of practice management systems, CRM, and custodian advisor systems
- Ability to prioritize and manage multiple tasks in a fast-paced environment
- Superior communication skills with the ability to work well under pressure
- Excellent organizational skills and attention to detail
- Takes initiative to learn and promote adoption of systems and workflows
- Excels in a small team environment and ability to adapt to change
- Meets deadlines with efficiency and accuracy

Riverbridge Partners, LLC is an Equal Opportunity Employer