Riverbridge

INVEST WITH ENDURANCE®

Job Opportunity: Private Client Relationship Manager

Employer: Riverbridge Partners, LLC
Location: Minneapolis, MN
Job Type: Full-Time

Our Company & Culture

Riverbridge is an investment firm located in downtown Minneapolis. We believe that investing is about more than money. It is about adding enduring value to lives, communities, and the world we are building together–for generations to come. We are a team of people who seek to learn and grow every day, not for our own gain but for the good of those we serve. We seek to have a service mindset guide all that we do, looking beyond our own self-interest. We also believe that adding value is a continual pursuit, so we are motivated to actively discern, seek feedback, and test our thinking in ways that push past prescribed pathways. We bring passion to our work and to how we build relationships.

Position Description

Our Relationship Managers serve as investment advisors to Riverbridge's individual and family clients. They work alongside clients and other team members to align clients' money with their goals so that they can lead a flourishing life. Additionally, they educate clients on the firm's investment philosophy and approach, advise on asset allocation, and develop and implement plans for all aspects of our clients' financial lives.

In this role, you will:

- Get to know clients intimately, including their goals, aspirations, families, and what it means for them to live a flourishing life.
- Educate clients on Riverbridge's investment and asset allocation philosophy and client service approach.
- Deliver investment recommendations and client service consistent with the Riverbridge team approach.
- Recommend an asset allocation to meet clients' needs using the Riverbridge Growth, Income, and Stability Framework as appropriate.
- Support clients with regular communication and in-person or virtual connections addressing investment performance, asset allocation alignment with goals, investor behavior, and other needs.
- Develop plans alongside clients where appropriate, foster good relationships with clients' trust, estate, tax and other trusted advisors, and keep clients informed.
- Expand existing relationships where appropriate and seek client referrals.
- Work closely with our client service team to onboard new clients and address client inquiries.
- Work with the Relationship Management Team to enhance the client experience.

You will be a good fit if:

- You are a team player who is collaborative and able to work with and through others.
- You welcome opportunities to learn and grow. You have earned the CFP® certification or equivalent or are open to pursuing the CFP® certification or equivalent.
- You are a resourceful and highly motivated self-starter. You take ownership for outcomes.
- You have high standards for your work; details, results and excellence all matter to you.
- You are a big people person with a small ego.
- You are excited by the opportunity to add enduring value to clients' lives.

Qualified candidates will possess a 4-year degree or equivalent experience. To apply, please submit a resume and cover letter to careers@riverbridge.com.

Riverbridge is an Equal Opportunity Employer.