



STONEBRIDGE

Capital Advisors

Title: Administrative Coordinator

Reports To: Lory Wessel, Chief Administrative Officer

Status: Full Time

Stonebridge Capital Advisors is a dynamic and nationally recognized Twin Cities based Investment Management Company celebrating over 20 years of providing investment and private wealth management services. We have always served our clients as a fiduciary; meaning our clients' best interests always come first. As a diverse team of professionals, we work together in achieving our clients' goals. We value the dedication, integrity and commitment each Stonebridge team member plays in our Company's success.

Purpose of Position

Our growing organization is searching for a candidate who is highly motivated, enjoys building relationships and thrives on the challenges of managing cross functional projects. This team member will work with our Advisory Relationships, Business Development, Marketing, and Client Relations Teams.

Summary of Job Responsibilities

Exemplify Company Core Values of Respect, Integrity and Trust. Establish, support, and maintain client relationships through exceptional service and compassion.

Broker Dealer-Advisory Relationships

- Support strategy and tactics for Broker Dealer and Advisory relationships
- Coordinate materials and communications for Advisor relationships
- Assist with the preparation and review of referral contracts
- Collaborate with Business Development Team to create prospect lists, support contact strategy
- Provide editing for Investment Management Proposals
- Collaborate communication across internal teams
- Provide monthly/quarterly reports to teams

Marketing

- Organize the distribution of marketing materials, sales kits and presentations
- Awards and recognition submission
- Regular copy editing
- Company event attendee list management
- Mass email recipient management
- Internal team email writeups

Client Relations

- Greet clients, visitors as first point of contact in phone calls and office visits
- Assist with updates and implementation of client relationship information within CRM and Portfolio Management systems
- Participate in Company and community events

Compliance

- Support and implement administrative and program policies, procedures, and service standards in cooperation with Compliance Team
- Assist with editing and completion of third-party and due diligence questionnaires
- Provide required due diligence materials as requested

Education, Licensing or Certification

- College Degree in Business Administration, Finance, Marketing, or relative experience
- Experience in building and maintaining client relationships

Knowledge, Skills, Abilities and Expectations

- Previous professional level administrative work experience
- Client Service oriented
- Positive, highly motivated, self-starter able to work independently and collaboratively with other team members, clients, advisors, and community
- Excellent verbal and written communication skills, including the ability to communicate in a caring and effective manner
- Proficient with Microsoft Suite, Outlook, CRMs, video conferencing software such as Microsoft Teams, Excel or other spreadsheets
- Solid attention to detail
- Demonstrated ability to balance competing demands, set priorities, anticipate needs, and manage multiple projects
- Prior project management experience
- Coordinate and assist team with travel arrangements
- Attend company sponsored and community events
- Other duties as needed

Compensation

Stonebridge Capital Advisors offers comprehensive benefits and a competitive salary based on experience and qualifications including medical insurance, dental plan, employer paid life insurance, short and long term disability, pre-tax health savings accounts, retirement plan, time off for community service events, generous vacation and sick leave, in addition to paid holidays each year.

Contact

Please submit your resume and cover letter to LWessel@Stonebridgecap.com