MAIRS & POWER

Focused Long-term Investing

Client Service Associate

Client Service Associate

Mairs & Power is Minnesota's oldest investment firm under continuous ownership and management. We offer an array of investment products to individuals, companies and organizations. We are seeking a candidates for the position of Client Service Associate.

Title:	Client Service Associate
Reports To:	Client Advisor/Client Service Manager
Department:	Client Service
Status:	Full Time / Non-Exempt
Location:	Hybrid work model (remote flexibility, with some in-office work required)

Summary: The Client Service Associate (CSA) plays a critical role in coordinating the day-to-day management of separately managed client accounts. This role works alongside Client Advisors, internal and external partners, and directly with clients to coordinate and ensure the thorough resolution of all account related activities and client requests.

Duties and Responsibilities:

- Processes and completes opening, closing, and asset transfer paperwork via electronic workflows
- Maintains day to day contact with clients and Client Advisor to ensure all client requests, paperwork, and servicing needs are handled in a timely, accurate, and professional manner.
- Assists Client Advisor with completion of estate evaluation and estate distributions
- Creates client reporting packages and materials for client meetings
- Responsible for creating and distributing client quarterly reports
- Assists Client Advisor with completion of required regulatory disclosures and audit requests
- Maintains client data and documentation in portfolio accounting system, Client Relationship Management tool (CRM) and file retention system in accordance with record retention standards

- Provides general administrative support including, but not limited to, calendar management and meeting coordination
- Processes client checks received
- Assists with required internal compliance testing
- Maintains custodial statement tracking
- Provides back up to Receptionist as assigned
- Performs other related duties and special projects as assigned

Skills:

- Strong interpersonal communication skills, including written and verbal
- Possess outstanding organizational skills and the ability to balance multiple priorities
- Ability to work independently without direct supervision
- Demonstrates initiative, problem solving ability, adaptability, flexibility, and detail orientation
- Proficient with MS Office Suite of products
- Proficient with Salesforce CRM preferred
- Desire to work in a team environment

Education/Experience:

- Bachelors or Associates degree or 5 years of experience doing client service or portfolio management support required
- Minimum of 3-5 years of experience in the financial services industry

To apply: Please email your cover letter and resume to careers@mairsandpower.com

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.