# CLIENT SERVICE ASSOCIATE

Operose Advisors LLC is a Wisconsin-based investment adviser working in partnership with independent investment consulting firm, Marquette Associates, Inc., to provide small/mid-market clients with access to institutional quality investment consulting and advisory services. Operose delivers an institutional approach to the planning, execution, and feedback of investment programs. Our mission is grounded in our commitment to investment excellence, exceptional client service and growth across all facets of our business. For more information, please visit [www.operoseadvisors.com](http://www.operoseadvisors.com).

The Client Service Associate plays an integral role in creating an exceptional client experience through direct client interaction and support of the Operose advisory team. This role requires a service mindset with excellent organization, communication skills, and attention to detail.

## ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Serve as a primary contact for all client service needs.
- Work with the Operose team and clients to service client needs.
- Actively engage in the business and obtain a detailed understanding of the firm's business activities, client base and internal processes.
- Be a key team member in assisting advisors with the onboarding of new client relationships.
- Prepare investment advisory agreements, rollover documentation, and facilitate other client administrative needs.
- Open and maintain client accounts at the custodian and within our portfolio accounting system.
- Assist with client money movement and cash management.
- Identify opportunities to create efficiencies in our current processes.
- Maintain client records within our CRM and network files.
- Support advisors through client meeting material prep and other ad hoc requests.
- Prepare client meeting materials.
- Comply with the firm's compliance and operational policies and procedures.
- Be a positive team member and proactively contribute to the culture and growth of the firm.

## QUALIFICATIONS AND EDUCATION REQUIREMENTS:

- Bachelor's degree with strong academic credentials preferred and a record of achievement.
- 2+ years applicable work experience.
- Strong writing and organizational skills.
- Attention to detail required.
- Ability to develop strong working relationships with team members across the firm.
- Ability to manage multiple tasks at once.
- Proficiency in Microsoft Office applications, especially Excel and PowerPoint.

COMPENSATION AND BENEFITS:

- Health, Dental and Vision Insurance
- 401(k) plan with employer match
- Profit Sharing
- Paid-time-off

**Seniority Level:** Associate
**Employment Type:** Full-time, in person
**Job Functions:** Client Service
**Industry:** Financial Services

## How to Apply

Interested candidates should submit a resume and cover letter to:
Carolina Itsines
Email: csi@operoseadvisors.com
Phone: 414-209-3280