

FIRM SUMMARY

Diversified Trust is a long-standing employee-owned comprehensive wealth management firm based in the Southeast with over \$5.5 billion of client assets under management. Our clients include individuals, multi-generational families, family offices, foundations, endowments, and retirement plans. We provide tailored investment management, financial planning, trust and estate, family office, and institutional advisory services through our offices in Atlanta, Greensboro, Memphis, and Nashville.

POSITION

Client Service Associate (CSA)

OFFICE

Atlanta

SUMMARY

DTC is a growing company, looking to add to our Atlanta team. We are seeking highly motivated, service-oriented, entrepreneurial-minded individuals who want a career in wealth management.

CONTACT

Jessica Stembridge
jstembridge@diversifiedtrust.com

FOR MORE INFO ON DTC

diversifiedtrust.com
Please review our videos.

FLSA STATUS: EXEMPT

DISCLAIMER:

This position description is not intended, and should not be construed to be, an exhaustive list of all responsibilities, skills, efforts or working conditions associated with the job. It is intended, however, to be an accurate summary of those principal job elements essential for making decisions related to job performance, employee development and compensation. This position may be required to perform other duties and responsibilities as assigned.

As a CSA, a typical day might include the following:

- Help the client service team by handling administrative tasks
- Assist with the preparation of customized reports and client or prospect meeting materials
- Collect and process information to setup new accounts
- Process account transfers, distributions, and deposits
- Communicate with clients' outside advisors
- Handle client needs for online access enrollment
- Receive, handle, and direct incoming client calls

This job might be for you if:

- You like helping people - we are in the relationship business, so helping people (our clients and the team) is key; client service is in your blood
- You enjoy solving problems - if you don't know the answer, you dig until you find it; you enjoy finding creative solutions to problems; you are known for your analytical skills and linear thought
- You pay attention to the details - anything worth doing is worth doing right; you stay focused and things do not fall through the cracks
- You are motivated and driven - you take ownership and openly accept new challenges; you want a career with growth opportunities; you are a hard worker
- You communicate clearly - you are well-written; you speak articulately; you are comfortable communicating in writing and on the phone
- You take confidentiality seriously - you maintain strict confidentiality of client and company information
- You are interested in what we do - financial planning, investments, and markets are exciting to you

To get this job you should have:

- A strong academic background with a Bachelor's degree or above
- A strong proficiency in Excel and PowerPoint

If this job seems like a good fit, please email your resume and cover letter to Jessica Stembridge.