FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over $6.5 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
Relationship Associate - Investments

OFFICE
Atlanta

SUMMARY
The Relationship Associate focuses on client and investment-related activities and may have direct client contact as part of the overall client service team. The Relationship Associate works in partnership with a team of client service professionals and the Investment Team providing exceptional wealth management, family office, advisory and trust services to clients. This position provides unique access to both the Investment and Relationship Management portions of the Firm.

CONTACT
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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 reflection of those principal job elements essential for making decisions related to job performance, employee development and compensation. As such, the incumbent may perform other duties and responsibilities as required.

Primary Duties and Responsibilities:
The primary responsibilities of the Relationship Associate include, but are not limited to, the following:

- In partnership with Relationship Manager, create, implement and document in the Investment Policy Statement appropriate asset allocation in accordance with client needs and current DTC portfolio management processes
- Work with the Investment Team to analyze model portfolios and outside managers
- Periodic assessment/rebalancing of portfolios in accord with the client's IPS and the current DTC portfolio management process
- Collaborate with other staff to improve efficiency of client service processes
- Receive, handle or direct incoming client inquiries to appropriate team members
- Provide support for the portfolio management of client accounts
- Oversee activities that support the client relationship team in daily account and business practices
- Assist with the preparation of customized reports including proposed allocations, management reports, investment transition plans, and investment marketing materials
- Create presentation material utilizing firm-wide standards and best practices that provides information to clients for their understanding of the investment strategy and returns for their portfolios
- Attend periodic client meetings; follow up with clients and team members on outstanding client service items

Skills and Qualifications:
- Bachelor's degree in Business or related field
- Working towards or obtained CFA, CPA, CFP®
- Minimum of 2 years of investment advisory, asset management or comparable experience
- Experience with financial/investment technology platforms; fluency in Excel and PowerPoint applications
- Understanding of VBA for use in Excel
- Ability to work with large financial market data sets
- Ethical practitioner with the ability to exercise sound judgment and effectively manage risk
- Ability to develop trust and build internal and external relationships
- Strong work ethic with the ability to work under pressure and handle multiple tasks within deadlines
- Strong analytical abilities and excellent attention to detail
- Excellent writing and communication skills
- Professional, pleasant and personable in dealing with clients
- Adaptable in a rapidly changing environment