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

OFFICE
Atlanta

SUMMARY
The Relationship Associate works in partnership with a team of client service professionals providing exceptional wealth management, family office, advisory and trust services to clients. The Relationship Associate focuses on client and investment-related support activities along with direct client contact as part of the overall client service team. Growth potential in career path to Relationship Manager and more client facing opportunities.

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:

- Attend periodic client meetings; follow up with clients and team members on outstanding client service items
- Oversee activities that support the client relationship team in daily account and business practices
- May provide wealth planning assistance to the client service team
- Assist with the preparation of customized reports and presentations for current and prospective client meetings
- Collect and process information to set up new accounts and manage updates to client information in firm systems in coordination with Client Administrator
- Conduct periodic reviews of client accounts, statements, and reports including initial completion of annual administrative and investment reviews; ensure all required documentation is on file and accounts are properly coded
- Collaborate with other staff to improve efficiency of client service processes
- Receive, handle or direct incoming client inquiries to appropriate team members

Skills and Qualifications:

- Bachelor's degree in Business or related field
- Working towards or obtained CFA, CPA, CFP® preferred
- Minimum of 2 years of investment advisory, asset management or comparable experience
- Experience with financial/investment technology platforms; proficiency in Excel and PowerPoint applications
- 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