FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over $7 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
Nashville

SUMMARY
Diversified Trust is a growing company, looking to add to our Nashville Team. We are seeking highly motivated, service-oriented, entrepreneurial-minded individuals to join us.

CONTACT
HR-Nashville@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.

Job Summary:

The Relationship Associate works in partnership with a team of client professionals providing exceptional wealth management, family office, advisory and trust services to clients.

Primary Duties and Responsibilities

Client Service:

- Oversee activities that support the client relationship team in daily account and business practices
- Assist with the preparation of customized reports and presentations for current and prospective client meetings
- 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
- Attend periodic client meetings; follow up with clients and team members on outstanding client service items
- Prudent management of business risks associated with prospective new business and ongoing relationship management of existing clients
- Provide excellent client service; respond to day-to-day inquiries and interactions with clients and other client service team members; assist in the research of client solutions

Wealth Strategies:

- Assist senior Wealth Strategists and other client service team members in developing and servicing client specific financial plans
- Correspond with clients to obtain necessary information for financial plan development; review client source materials
- Initial input of information into planning software for analysis and development of client presentation materials
- Participate in wealth strategies team meetings and collaborate with colleagues to improve efficiency of wealth strategies processes and deliverables

Skills/Competencies necessary for this job include:

- Bachelor's degree in Business or related field, or equivalent education and related training; advanced degree preferred
- CFP, CPA, CPWA or other advanced designation preferred
- 3+ years of financial planning, estate and/or tax planning experience, investment advisory or comparable experience preferred
- A working knowledge of the application of wealth management planning such as cash flow, education, retirement, risk management and insurance, tax, business tax, trust, and estate and wealth transfer
- 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

If this job seems like a good fit, please email your resume and cover letter to HR-Nashville@diversifiedtrust.com