

FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over \$8 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, Charleston, Greensboro, Memphis and Nashville.

POSITION

Client Administrator

OFFICE

Charleston

SUMMARY

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

CONTACT

HR@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 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.

Job Summary:

The Client Administrator works with and supports client service teams in providing exceptional wealth management, investment advisory and estate/trust services to firm clients. The Client Administrator serves as the general knowledge base on all operational aspects of client service. In addition, the Client Administrator shares best practices and resolves issues by being actively involved with client service teams.

Primary Duties and Responsibilities

The primary responsibilities of the Client Administrator include, but are not limited to, the following:

- Provide timely, proactive, and exceptional service to all clients; maintain a thorough understanding of client expectations and family dynamics
- Manage and respond to day-to-day inquiries and interactions with clients
- Process account service requests including account opening, asset transfers, distributions, deposits, disbursements, post wires, ACH and account closing
- Serve as the client service team liaison with Operations, FIS and Schwab
- Coordinate client tax, estate and personal issues with CPAs, attorneys, insurance agents and other service providers
- Serve as an active part of the estate process for clients; identify required processes to settle the estate if DTC is an executor of the estate
- Manage all retirement plan required minimum distribution payments
- Provide local office project management for company-wide initiatives, as needed
- Serve as primary contact for technology issues, CRM database, equipment management and vendor management
- Partner with marketing to provide support for local office marketing and external communication efforts, events and sponsorships
- Provide general phone coverage and guest reception on a regular basis
- Maintain strict confidentiality of client and company information

Skills and Qualifications:

- Bachelor's degree preferred
- D to F years of wealth management, trust services or comparable experience preferred
- Ethical practitioner with ability to exercise sound judgment
- 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
- 3+ years of client service experience
- Excellent communication skills
- Professional and personable in dealing with clients
- Adaptable in a rapidly changing environment

If this job seems like a good fit, please email your resume to HR@diversifiedtrust.com