

# 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

Relationship Associate

## OFFICE

Greensboro, NC

## SUMMARY

Diversified Trust is a growing company, looking to add to our Greensboro 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 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, investment 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
- Attend periodic client meetings; follow up with clients and team members on outstanding client service items
- 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:

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#### Investment Management:

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### Skills/Competencies necessary for this job include:

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...+...\$.../\$...ff...
- \$...-/\$...ft.../\$...
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If this job seems like a good fit,  
please email your resume to HR@diversifiedtrust.com