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 Service Specialist

OFFICE

Memphis

SUMMARY

Diversified Trust is a growing company, looking to add to our Memphis 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 Service Specialist works directly with Client Administrators, Corporate Operations, and other team members to provide operational support for wealth management, investment advisory, and estate / trust services to our clients. The Client Service Specialist has a high level of systems knowledge and focuses on client-related activities in coordination with operations and our custodians.

Primary Duties and Responsibilities

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

- Collect and process information for setup of new accounts and account transfers in TrustDesk and CRM
- Support client relationship teams in daily account and business practices, and improve efficiency of client service procedures
- Perform account service requests, including distributions and deposits, post wires and ACH; maintain appropriate audit documentation, including documentation of all trust tax returns and payments
- Manage updates to client information in firm systems, conduct periodic reviews of client statements and reports, and perform annual administrative reviews of client accounts attesting to such
- Facilitate client online access enrollment
- Participate in the administrative review process as needed
- Manage investment subscription document process
- Communicate with and coordinate delivery of tax and audit documents to clients' outside advisors; retrieve and maintain client-related information from third-party providers
- Primary daily backup of phone coverage and desk reception; assist with client mailings, preparation of correspondence and maintenance of client files
- Fulfill Office manager duties in the absence of Office Manager to include timely distribution of client and office deliverables, and

Skills and Qualifications:

- Bachelor’s degree preferred
- Minimum of 3 years of wealth management, trust services or comparable experience preferred
- 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
- Ability to exercise sound judgment and effectively manage risk
- Adaptable in a rapidly changing environment
- Proficient in Excel, Word, PowerPoint

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