FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over $9 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. This position serves as the general knowledge base on all operational aspects of client service and has a high level of systems knowledge in coordination with operations and our custodians.

Primary Duties and Responsibilities

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

- Origination of new accounts and account transfers in TrustDesk and CRM
- Account service including distributions and deposits; posting wires and ACH; maintaining appropriate audit documentation including documentation of all trust tax returns and payments.
- Manage updates to client information in firm systems; facilitate client online access enrollment
- Manage investment subscription document process
- Coordinate delivery of tax and audit documents to clients' outside advisors; retrieve and maintain client-related information from third-party providers
- May work with client relationships for account opening (documentation, asset transfers, review of asset transfer costs and problem assets) and account closing (termination of fees, deletion of recurring distributions)
- Management of phone coverage and desk reception; ensuring reception area, conference rooms, workroom and breakroom are tidy and presentable with all necessary supplies
- Coordination of office and client events
- Management of primary day-to-day supplier and vendor management, overseeing office supply inventory and reviewing account invoices for accuracy and approval

Skills and Qualifications:

- Bachelor’s degree preferred
- Minimum of 1 year of wealth management, trust services or comparable experience required
- Ethical practitioner with the ability to exercise sound judgment, effectively manage risk, and ensure security and confidentiality of client and firm information
- Ability to develop trust and build internal and external relationships
- Strong work ethic with ability to work under pressure and handle multiple tasks
- Highly organized with keen attention to detail and ability to work with minimum oversight
- Excellent interpersonal and communication skills
- Proficient in MS Office; experience with TrustDesk, contact management software and Schwab is a plus

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