Client Service Associate Job Description (May, 2017)

About Us: Established on Wall Street in 1989, Sterneck Capital Management, LLC (SCM) serves a national client base offering tailored investment portfolios, financial planning and consultative wealth services for individuals and families.

As an SEC Registered Investment Advisor, SCM's fiduciary responsibilities and values are underscored by the commitment to put clients and their interests first. Our focus continues to be on growth and high service levels.

We are active value managers. We invest and manage capital for high net worth individuals, executives, business owners, foundations and multi-generational family entities.

We have a particular focus on the use of non-correlated alternative investments as we look to derive returns from a diverse source of asset classes and strategies, including traditional equity and income-oriented exposure. We weight the allocations appropriately as we construct tailored portfolios based on clients' goals, risk tolerance and time horizon.

Core values include integrity, excellence, client-centric stewardship and teamwork. This is a unique opportunity to join a growing firm and dynamic team.

Role Summary: Sterneck Capital Management is seeking an experienced and motivated Client Services Associate to help meet our key objective of growing assets under management. Our Client Service Associate will provide routine non-advice service support to external clients and administrative support to internal team members. The ideal candidate for this job is resourceful, a good problem solver, detail-oriented, organized and values accuracy and effective relationship. The ability to multi-task and assure a steady completion of workload in a confidential, complaint and timely manner is key to success in this position.

Key responsibilities will include:

- Responsible for handling routine client servicing support (answering phone and email inquiries) with optimal customer service while operating within ethical and compliance guidelines.
- Perform new client onboarding duties including accurate completion of forms and reports, adhering to a strict confidentiality policy while maintaining strict attention to detail and data quality.
- Responsible for administrative duties including document creation, dissemination, filing and scheduling.
- Navigate data integrity within the company Client Relationship Management Tool.
- Develop and maintain positive relationships with external clients and internal team members within the firm.

- Collaborate with team members on ways to improve current processes or implement new efficiencies.
- Perform other duties as assigned.

Qualifications:

- Bachelor's degree preferred
- Strong aptitude for computer systems is required with expertise in Microsoft Word, PowerPoint and Excel.
- Superior organization skills, strong analytical skills, detail oriented and dedicated to complete projects in a timely manner
- Strong verbal and written communication skills.
- Ability to organize time and perform tasks with minimal direction. Must take ownership of assigned tasks and show initiative in identifying opportunities for improved efficiencies.
- Individual must embrace change, have a desire to learn, a positive attitude and willingness to go above and beyond in providing customer service to clients and associates within the firm.
- Ability to gain and maintain trust.

Compensation: Competitive pay commensurate with experience.

Benefits:

- ➢ Health care, dental and prescription benefits
- ➢ Paid holidays & vacation
- ➢ 401(k) with company match

Additional requirements: Comply with pre-employment reference requests and screenings.

Send resume to:

info@sterneckcapital.com
Sterneck Capital Management
4510 Belleview Ave
Kansas City, MO 64111
Attn: Brandie Giffin