

CLIENT SERVICES & PORTFOLIO ADMINISTRATOR

Department: Wealth Management
Status: Full-Time
Benefits: Yes

SIMA Financial Group, Inc. is a professional services firm headquartered in Richmond, Virginia that employs a talented, client-centered team of professionals and support staff. Our certified and licensed professionals are dedicated to their unique discipline within SIMA's five core competencies: accounting & tax, payroll & workforce management, employee benefits, corporate retirement and wealth management. We work closely with businesses and individuals to provide a superior experience to our diverse clientele that includes business owners, executives, entrepreneurs, and investors. SIMA identifies and implements financial strategies to more effectively manage both business and personal finances. Founded, grown, and managed in a morally-rich, values-driven environment, SIMA has proudly served clients with professional, personal, and principled care since 1985.

OVERVIEW & RESPONSIBILITIES

The Client Services & Portfolio Administrator will be instrumental in servicing and nurturing client relationships and will play a key role in project management within the department. In the short-term, this position will primarily act as a liaison between clients, custodians, and the wealth department to ensure efficient day-to-day operations. In the long-term (2-4 years), this position will evolve into a senior role that will be responsible for managing a team of CSAs.

- Manage client needs in all aspects of service including opening/updating client accounts, new client onboarding, processing client requests, money/asset transfers, resolving client inquiries and making sure key client information and documentation is up to date.
- Coordinate client meetings and prepare materials for client reviews and prospective client meetings. May assist senior professionals in conducting meetings.
- Document client action and coordinate assignments and progress with the wealth team. Take the lead to follow-up and ensure client related goals and tasks are completed on time.
- Maintain CRM and other firm databases. Follow department process and procedures while actively looking for opportunities to implement improvements and efficiencies.
- Process and reconcile quarterly client billing through Tamarac Advisor View software.
- Assist in implementing the firm's compliance program, under the direction of the Chief Compliance Officer.

QUALIFICATIONS & REQUIREMENTS

Education & Experience

- Minimum 5 years of experience in the financial services industry
- Bachelor's degree from an accredited university preferred
- Experience working under a fee-based advisory platform/Registered Investment Advisory (RIA) firm a plus
- Experience using Envestnet Tamarac Advisor Suite or other similar CRM and reporting and software preferred
- Proficiency with Microsoft Word, Excel, PowerPoint and Outlook

Skills & Core Values

- Demonstrated ability to drive execution and results
- Strong analytical and problem-solving skills
- Excellent communication skills, both written and verbal
- High level of confidentiality and professionalism
- Client service oriented
- Strong organizational and time management skills
- Detail-oriented with a high degree of accuracy
- Ability to manage workflow and ensure projects/tasks are processed in a timely manner
- Ability to be proactive and not reactive in all aspects of daily job functions
- Ability to collaborate and operate as part of a team
- Self-motivated and able to work well within a fast-paced environment with firm deadlines

SALARY & BENEFITS

We offer an attractive salary with future opportunities for growth and advancement. In addition, we offer an exceptional benefit package, including an employer 401(k) contributions, Paid Time Off, long-term disability insurance, life insurance, and elective medical, dental and vision benefits.

CONTACT

To be considered for this immediate opening, please send your resume with salary requirements to careers@simafg.com or fax your resume in confidence to (804) 285-5656. This position will remain open until filled.

EOE. SIMA Financial Group, Inc. reserves the right to alter, change, modify and/or terminate this job posting at any time without notice, or obligation, to any party.