Arnerich Massena Position Posting:
Senior Client Associate

SUMMARY

Position overview: Senior Client Associate

Arnerich Massena is searching for an experienced Senior Client Associate to provide high-touch, personalized, and best-in-class service for client portfolios. This position is the day-to-day contact for clients and has primary responsibility for account servicing. The Senior Client Associate also implements and maintains investment recommendations for high net worth and institutional clients, in accordance with the investment policy statement, and as directed by the investment advisor. This position provides general account maintenance and acts as the liaison between the client, their financial institutions, investment managers, and outside partnerships.

About Arnerich Massena

Founded in 1991, Arnerich Massena is a West Coast-based investment consulting firm that provides discretionary and advisory services for institutional and private investors. The firm works with private clients and families, and endowments and foundations. Arnerich Massena is distinguished by a focus on exceptional client service, top-tier investment research, and a long history of building creative, high-quality investment programs. For more information, please visit our website at www.arnerichmassena.com.

At Arnerich Massena, we believe that our people are our greatest asset. With this in mind, we offer a unique corporate culture and competitive benefits package. We are committed to community service and invite employees to spend a portion of their work week volunteering for our community service program. Throughout each year, the firm hosts events for employees to inspire an environment of engagement, appreciation, and team cohesiveness. Our benefits package includes comprehensive health, dental, and vision insurance; a 401(k) retirement plan; and a generous sabbatical program. Visit our careers page at https://arnerichmassena.com/careers.

POSITION DETAILS

Essential Functions

- Provide exceptional client service while tailoring communications and work style to fit the unique needs of each individual client.
- Serve as the dedicated point of contact for account and investment service issues for an assigned list of clients; resolve and respond to client inquiries.

- New account set up, account and fund transfers, money movements, and capital call processing with a high degree of accuracy.
- Partner with advisors to implement and maintain client investment portfolios. Place trades, draft and submit directives to custodians and money managers, complete subscription documents, and other related tasks.
- Act as liaison between the client and their other financial institutions and investment managers.
- Monitor client cash holdings. Coordinate raising cash for client needs and funding of investments and work with advisors to invest excess cash.
- Coordinate with clients and their estate planning attorneys to transfer assets into trust ownership and execute estate settlement distributions.
- Attend prospect, onboarding, and client meetings with advisors, as requested.
- Compile and provide tax-related documents to clients and their tax professionals.
- Coordinate with clients, custodians, and investment managers to provide annual audit confirmations, audited financials, and any additional information as requested by auditors.
- Work closely with and support other team members and their assigned clients; back up other team members regularly.
- Other job-related duties as assigned.

Qualifications:

- Minimum of ten (10) years' experience working at a Registered Investment Advisor (RIA), brokerage firm or related experience, as well as a demonstrated understanding of financial markets, investment terminology and investment operations. Experience with alternative investments highly preferred.
- Experience with Schwab Institutional custodial platform and Tamarac software highly preferred.
- Four-year college degree preferred.
- Ability to exercise independent judgement while working in a self-directed environment.
- Must be client service-oriented with excellent communication, interpersonal, and organizational skills.
- Demonstrated ability to prioritize, collaborate, and handle multiple tasks, while tracking evolving details; capacity to maintain flexibility while meeting deadlines.
- Driven to support advisors and fellow team members and contribute to the team's collective success.
- High level of comfort, effectiveness, and professionalism interacting with prospects, clients, custodians, CPAs, attorneys, and investment advisors and staff.
- Proficiency in a variety of computer programs and online software, including Microsoft Office suite; familiarity with CRMs and internet-based work.

Arnerich Massena seeks candidates who demonstrate a strong work ethic and the ability to be self-motivated. Candidates must be committed to providing superior customer service with a focus on quality and resolving customer service issues in a timely manner. Attention to detail and strong organizational skills are required. This position requires both the ability to work effectively as part of a team and the ability to work independently. We seek candidates who can thrive in a challenging, fast-paced, and deadline-driven environment.

HOW TO APPLY:

Please send your resume and a cover letter via email or fax. We will review all submissions and contact only those candidates who meet the above requirements.

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