



Job Title: Client Services Representative

Location: Century City

Westmount Asset Management, a Los Angeles-based investment advisory firm, is seeking a Client Services Representative to provide support to our operations and client service functions. You will work closely with Operations personnel and Portfolio Managers to communicate with clients, assist with opening and maintaining client accounts, and interact with brokerage firms to ensure client transactions are being expedited. Will lend support in other various duties of Operations and Client Services.

RESPONSIBILITIES

Primary responsibilities include the following:

- Prepare account paperwork for clients. These consist of investment account applications, transfer of account forms as well as other financial documents.
- Interact with clients by phone, mail and email to service their accounts. This includes account opening and updates, monetary transactions (deposits and withdrawals) and other services.
- Interact with various brokerage firms on behalf of clients to ensure timely processing of transactions and that accounts are properly maintained.
- Maintain client data and account information in our portfolio management system and CRM database.

QUALIFICATIONS

The ideal candidate should have:

- At least 2-5 years experience in client service in the investment industry.
- Excellent phone etiquette and highly polished communication skills. Must be client service oriented and enjoy helping people with their account needs.
- Prior experience dealing with Charles Schwab (opening Schwab accounts, processing Schwab documents, interfacing with their service teams) is highly desirable.
- Proficiency in MS Word, Excel and Outlook. Knowledge of Orion and MS-CRM is a plus.

- Working with alternative and private investments is helpful and preferred.
- Attention to detail and the ability to multitask are a MUST.
- A basic understanding of different account types (Individual, Joint, Custodial, IRA, Roth, Trusts, etc.).
- The ability to take initiative and be a self-starter.

OTHER REQUIRED ATTRIBUTES

Ability to work in a fast-paced environment.

Excellent organizational skills.

Demonstrate a strong interest in the investment business with the ability to learn quickly.

Ability to be a team player, as well as an independent worker.

Excellent communication skills and a positive, can-do attitude.

We offer a challenging work environment with competitive compensation and benefits.