

CLIFFORD SWAN

INVESTMENT COUNSELORS

CLIENT SERVICES DATA ENTRY SPECIALIST

GENERAL DUTIES

- Reports to Operations Manager
- Provides Assistance to Client Services Manager; Operations Manager and Marketing and Communications Manager

CLIENT SERVICE/DATA ENTRY SUPPORT

- Data entry necessary to establish new clients, prospects and changes to existing clients for all applicable systems.
- Complete New Account/Closed Account forms and checklists and forward notice to applicable CSIC staff members when complete.
- Monitor progress of paperwork, trouble-shooting as necessary and ensuring timely completion of process. Maintain a log of pending items, reviewing with Client Service Specialist and/or Operations Manager on a weekly basis.
- Scan appropriate documents into client files on the shared network drive
- Assist in maintaining APX database, ensuring that changes to account names, account numbers and addresses are updated in a timely fashion.

PORTFOLIO REPORTING

- Assist in the production and distribution of client reports on monthly and quarterly basis.
- Assist in the production of reports and presentation materials as requested for client meetings

MARKETING AND COMMUNICATIONS

- Assist Marketing and Communications Manager in maintaining Prospect and New Business Pipeline reports
- Assemble prospect presentation booklets as requested
- Assist in the distribution of newsletters and other firm communications.

RECEPTIONIST AND GENERAL ADMINISTRATION

- Provide backup support for Receptionist
- Maintain a neat work area, filing paperwork in a timely manner and ensuring that desk is clean of any client-related paperwork at end of day.
- Other duties as assigned.

QUALIFICATIONS

- High School diploma (with business school or college credits preferred)
- 1 to 3 years work experience. Knowledge in financial services industry a plus
- Proficiency in Microsoft Excel, Word and Power Point
- Strong communication skills
- Attention to detail and accuracy
- Ability to work collaboratively and as part of a team
- Must be eligible to work in the United States without sponsorship or restriction

To apply, please send resume and cover letter to info@cliffordswan.com.