MASSEY QUICK SIMON℠ WEALTH MANAGEMENT INVESTMENT CONSULTING

Job Title: Client Service Administrator
Location: Morristown, New Jersey

About Massey Quick Simon

Massey Quick was founded in 2004 to create a different kind of wealth management – one that suits its clients' best interests as a fiduciary by seeking to align the firm's goals with those of our clients and offer objective professional advice. On April of 2017, we underwent a merger with William E. Simon & Sons, our two firms have joined to form Massey Quick Simon and together we provide wealth management, investment consulting and family office services to high net worth individuals, families, endowments, foundations, and single family offices.

Why Work at Massey Quick Simon?

Massey Quick Simon's culture and company philosophy are founded on a set of fundamental values that influence the choices we make and the actions we take. Our core values encompass integrity & honesty, mutual trust & respect, ownership & accountability, and humility. We provide opportunity, nurture talent, develop our people and reward achievement. You will be joining a culture that promotes functional excellence and teamwork, a passion for learning, and values employee input to help shape the future of the firm.

Duties & Responsibilities

The Client Service Administrator supports the Client Advisor team with day-to-day administrative and documentation needs. Examples of job duties include:

- Populate and process documentation for account opening, investments, money movement, and other account maintenance.
- Interact with third party service providers (i.e. outside custodians, reporting providers, and other advisors).
- Interface with money managers regarding investment activity.
- Monitor client liquidity needs and daily account activity reports.
- Enter, track, and reconcile investment activity across our proprietary database, various custodians and our reporting provider.
- Maintain client confidentiality and assist in identifying potentially fraudulent activity.

Attributes

- Foster a positive atmosphere within the office and with clients.
- Display team-oriented, collaborative spirit.
- Present professional behavior, appearance, and etiquette at all times.
- Ability to work under multiple managers in a dynamic environment.
- Ability to work at a high level of independence.

Qualifications

- Administrative experience is preferred. Preference will be given to candidates with experience in the financial services industry.
- Superior organizational, time management, and written/oral communication skills.
- Process-driven and proactive with excellent problem solving and analytical skills.
- Excellent attention to detail and superior ability to focus.
- Agile ability to manage multiple tasks, systems, and processes while meeting deadlines.
- Experience with eSignature programs including Docusign; Adobe (PDF) Writer; Salesforce; Microsoft Office, particularly Excel, Outlook, and Word.

Salary & Benefits

Salary and bonus are competitive based on industry standards and experience level. Benefits include dental, vision, health care, and 401(k) with company match.

Financial support for professional accreditation and continuing education requirements. Transparent open door culture and friendly working environment.

Every employee is provided with a dedicated mentor and career path guidance.

Application Process

To apply, please submit a cover letter and resume to jobs@mqsadvisors.com and complete the online application at http://www.hrmcacclaim.com/ho3/abw/job_redirect.asp?did=98&jid=109.