MATTHIAS PRIVATE WEALTH, LLC

Matthias Private Wealth (MPW) is a full service multi-family office with unique culture and professional depth due to our origin. We were founded as a comprehensive single family office designed to serve our founding family's diverse wealth management needs. With multiple generations of our own successful attorneys, tax specialists, fiduciaries, investors, and other wealth management specialists, we understand the convenience and strategic power of aggregating our collective professional knowledge under one roof. We achieve simplification and powerful collaboration while fixed on our central focus – our clients.

CLIENT SERVICE ASSOCIATE: JOB DESCRIPTION & RESPONSIBLITIES

We are offering an opportunity to join our team as a Client Service Associate. The Client Service Associate is the primary contact with family office clients. This role is responsible for executing wealth management solutions catered to each client's needs and expectations. This integrated services role collaborates with internal teams for investment advisory, financial planning, estate/trust planning tax planning, coordination of tax preparation services, personal accounting and bill pay and other family office services. Responsibilities include:

- Support Senior Advisor in gathering data including financial, investment, and estate, trust and tax planning documents
- Attend client meetings and prepare meeting agendas, financial statements, financial plan analyses and other relevant wealth management documents
- Regularly review client data and help identify planning opportunities to provide solutions for clients
- Prepare draft plan reports, meeting minutes, client communications
- Serve as primary liaison with firm's sub-advisors and private equity firms
- Regularly review client's portfolio and work with Advisor to meet client goals
- Review and maintain tax, insurance, estate and trust planning documents; collaborate with internal teams to implement client goals
- Prepare mortgage amortization analyses and other financial modeling such as RMDs, education funding, insurance needs
- Maintain CRM, custodial platforms, project management/workflow and other tech software
- Ensure all work meets audit and compliance standards

This position requires a diverse skill set, problem solving, professionalism, organization and superior communication to strengthen client relationships. The ability to work as a team member is critical. As a full-service family office, this role is responsible for communicating with clients and identifying client service needs within our host of professional services, including: investments; wealth management; estates, trusts and charitable giving; tax planning; cash flow; and business advisory. This position should be working to obtain and/or show initiative to develop the necessary skills to move into a certified financial planner (CFP), certified financial advisor (CFA), wealth management certified professional (WMCF), masters in business (MBA) or similar certification within 1-3 years.

QUALIFICATIONS

- 1-3 years financial services experience in an administrative or client service role.
- Bachelor's degree
- Plan to obtain CFP certification or similar certification within 1-3 years
- Excellent computer skills, strong proficiency with Microsoft Office (Excel, Outlook). Experience with Salesforce, custodian platforms, financial planning software and portfolio management systems.
- Superb written and verbal communication skills.
- Professional appearance and a strong understanding of business etiquette.
- A team player that possesses the ability to work independently.

COMPENSATION

Compensation is competitive based on the candidate's experience. Bonus structure and benefits to include employer paid health insurance and 401(k). Vacation and paid time off per firm policy. Candidate will benefit from our management training program that includes courses such as public speaking, financial planning, custodial processes, compliance, estate and tax planning and others.