



Job title	<i>Client Solutions Group Associate</i>
Reports to	<i>Director of Client Solutions Group</i>

Job purpose

As a Client Solutions Group (CSG) Associate for AndCo, you will be responsible for operational and analytic support to the CSG team. The primary responsibilities are collecting and maintaining client electronic custodial and investment statements, distribution of monthly/quarterly performance reports and manage the distribution, collection and electronic filing of investment manager compliance spreadsheets. The candidate must have the ability to prioritize and manage multiple and diverse assignments simultaneously.

Duties and responsibilities

- Provide support to the Client Solutions Group
- Collect and file critical client information including custodial statements, investment manager reports / data, investment policy statements, contracts, correspondence, contact information, etc.
- Distribute, collect and maintain investment manager compliance spreadsheet
- Upload holdings and fixed income portfolio characteristics into reporting system
- Coordinate the printing, distribution and shipping of client reports.
- Participate on special projects as requested

Desired Skills

- Ability to meet deadlines in a time-sensitive, high pressure environment;
- Excellent writing, editing and proofreading skills;
- Ability to work effectively and proactively, both independently and as part of a team;
- Reliable, self-motivated, and focused on delivering quality products

Qualifications

- Bachelor degree required. An advanced degree and / or industry certification such as an MBA, CIPM, CFA is preferred
- PC proficiency including Microsoft Office; specifically Outlook, Word, Excel, and PowerPoint
- Strong written and verbal communication skills
- Research capabilities through all available resources
- Associate should be organized self-motivated with the ability to multi task effectively

If interested, please submit your resume to: recruiting@andcoconsulting.com