Lowell Blake

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Client Service Associate

The Firm

Lowell, Blake & Associates, Inc. is an independent registered investment advisor firm based in Boston. We pride ourselves on our independent thinking, integrity, and personal approach to meeting our clients' needs. Our firm manages over $650 million in assets utilizing individual equities and individual fixed income. LBA has provided personalized financial services and support for individuals, families, nonprofits, and businesses since 1974.

Position Description

We are seeking a highly motivated professional to work with us as a Client Service Associate. The successful candidate will be a key member of the LBA team in providing comprehensive administrative and operational support to both clients and portfolio managers. We believe no job is too big or small when it comes to assisting our clients and enjoy collaborating as a team to come to creative solutions. We seek someone who takes great pride in their work and views obstacles as an exciting challenge.

Primary Responsibilities and Duties

- Maintain existing client relationships through the processing of client requests, resolving client inquiries, and ensuring key client information and documentation is up to date
- Handle asset transfers including ACH/wires, bill payments, estimated tax payments, check requests/deposits, stock gifts
- Onboard new client accounts, including the collection of required documentation and client information
- Research and resolve complex operational or client issues. Provide status updates on problem resolution and outstanding issues to appropriate team members
- Act as a resource for clients on web-based platforms
- Assist in executing daily trading
- Assemble highly confidential and sensitive information including electronic filing, correspondence memos, letters, and trade recommendations in compliance with internal procedures
- Create, maintain and process ad-hoc client reporting through our portfolio management software and CRM
- Assist in answering phones

Desired Skills and Experience

- Two to five years of experience with an established track record
- Proficiency in MS Office (Outlook, Excel, Word and PowerPoint), Schwab Alliance and Wealthscape
- Strong interpersonal skills that enable effective verbal and written communication with a wide variety of people
- Excellent organizational skills with strong attention to detail
- The ability to work autonomously and to collaborate with a team
- An interest and ability utilizing technology to enhance efficiency
- The ability to solve problems independently and seamlessly manage multiple roles

Compensation/Benefits

- Competitive salary with incentive bonus
- Medical
- Dental
- Basic life insurance and accidental death and dismemberment coverage
- Group short-term disability insurance
- Group long-term disability insurance
- Paid time off
- 401(k)