CLIENT RELATIONSHIP ASSOCIATE

RMD | R.M.DAVIS
PRIVATE WEALTH MANAGEMENT

Do you want to work with an industry leader, in a dynamic environment that fosters professional growth? Then join the **R.M. Davis** team! With $6+ billion in assets under management, **R.M. Davis** is Northern New England's largest wealth management firm, with offices in downtown Portland, Maine, and Portsmouth, New Hampshire.

Our clients trust us with their wealth, with their toughest questions, and with their most important decisions. They count on our team to help guide them through life's critical moments. We seek team members who embrace this opportunity.

Headquartered in the heart of Portland, R. M. Davis is a proud member and contributor of the local community. Located just steps from restaurants, shops, entertainment, and other professional firms, our team enjoys an area that truly offers a "work, live, and play" environment.

The position

We are hiring a full-time **Client Relationship Associate** to join our growing team in Portland, ME. If you are a self-motivated professional with a customer service mindset and a passion for working in the financial services industry, apply today!

Your responsibilities

Given the nature of our work, our administrative team plays an integral role in the success of our firm, and the work we do for our clients. The **Client Relationship Associate** role serves as our clients' communication point person. In addition, they act as liaison between our clients and other professionals, including attorneys, accountants, and custodians. **The Client Relationship Associate** performs a wide variety of high-priority tasks including the preparation of client materials such as financial plans, contracts, and custodial paperwork. They are also responsible for processing required minimum distributions, consolidating accounts, security cost basis work, and preparing statistical charts and other financial analyses. This position also supports the Client Advisor in all aspects of the client relationship, including attending and participating in client meetings.

Your skills

- Bachelor's degree in finance or business administration preferred
- Minimum of 2-3 years of prior work experience in the investment, stock brokerage, bank trust or portfolio management profession is desired
- Strong analytical skills, ability, and desire to work with numerical detail and related problem-solving

- The ability to manage tight time frames and perform multiple and competing tasks efficiently and independently
- Professional, friendly demeanor with client-first mindset
- Excellent interpersonal, relationship building and communication skills
- Strong organizational and time management skills
- Strong attention to detail and problem-solving skills
- Microsoft Office experience and the ability to learn various portfolio management software applications.
- Accustomed to working in a collaborative work culture

Your company benefits

- Competitive salary and bonus
- 401k plan with employer contributions
- 100% Company-paid employee health insurance and disability insurance
- Paid time off
- Company-paid, parental leave
- Education reimbursement
- Company-paid, covered parking
- Professional office setting
- Hybrid remote work policy
- Collaborative work culture

If this sounds like you, please send a cover letter and resume to:

R.M. Davis, Inc.
Attn: Denise Vigneault, Vice President - Human Resources
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Portland, ME 04101
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