Client Service Manager (Boulder/Denver)
BSW Operations Group

Ideal Candidate – Who You Are:

- Do you enjoy helping people? Partnering with colleagues while also working independently?
- Are you skilled at engaging with clients? Driven to provide a high-touch client experience?
- Do you have experience in areas of client communication?
- Do you enjoy organizing and managing processes?
- Are you detail-oriented and skilled at oversight + tracking of projects?
- Are you looking to grow with an innovative team and join a company that is independent, employee-owned, and nationally recognized as a Best Place To Work and uses business as a force for good?

BSW Wealth Partners – Who We Are:

BSW is a multi-family office and wealth advisory firm managing $1.7 billion for a national and international clientele from offices in Boulder and Denver. Our purpose is to Make Life Better. BSW has been named a Best Place to Work by Outside Magazine, Investment News, and the Denver Business Journal; one of the top 300 Financial Advisers by the Financial Times; is Gender Equity Now certified; a Certified B Corporation; and a Public Benefit Corporation (PBC).

Position Description – Your Dream Positions:

The BSW Client Service Manager role comprises the following:

1. Provide a high-touch service experience for clients, optimizing client satisfaction.

   Develop expert knowledge of team's client base through strong relationship building with BSW clients. Serve as clients' professional liaison internally and externally to CPA's, banks, attorney, and other professionals. Ensure timely execution of cashiering and other service requests. Partner with your Advisory Group and Operations Group colleagues to provide a first-class onboarding experience for new BSW clients.
2. Provide support to team of advisors and portfolio managers.

   Each BSW client is served by a team of three professionals: Advisor (client-lead + financial planning), Portfolio Manager (portfolio + investments), and Client Service Manager (client liaison + operations). Facilitate regular meetings with team and understand nuances to assist in relationship building. Through CRM, coordinate all tasks and activities, document client interaction, track last contact dates, and perform follow-up.
3. Prepare and execute paperwork.

   Become a master of Schwab and Fidelity paperwork for new accounts, transfers, change of address, and all paperwork required to maintain and update custodial accounts. Prepare subscription documents and capital call wires for private investments; open and fund alternative investments. Assist with RMDs, Roth conversions and inherited IRAs. Interface with BSW clients to provide a frustration free paperwork experience.
4. Coordinate internal meeting preparation.

   Assist with scheduling of internal and external meetings, including kick-off meetings for new BSW clients.

Qualifications – The Right Stuff:

- 2+ years of client service experience in the financial industry
- Attention to detail, well organized, self-motivated, and self-managed.
- Strong writing, excellent communication + customer service, and polished interpersonal skills.
- Ability to develop internal procedures and systems.
- Ability to meet deadlines.
- Proficient in MS Office Suite, data entry experience, ability to quickly learn new systems. Familiarity with Dynamics 365 CRM preferred, not required.
- Outstanding integrity and discretion.
- Familiarity with Schwab and Fidelity account paperwork preferred, but not required.
- A desire and ability to provide a high level of service in a fast-paced and growing wealth advisory firm.
- Undergraduate degree preferred.

Perks – Why We're a Perennial Best Place to Work:

- Summer Fun Days
- Profit Sharing, 401(k) Plan + Matching
- Health Savings Account + BSW-funded Healthcare
- Paid Maternity & Paternity Leave
- Employee Sabbatical Program
- BSW pays for obtaining and maintaining professional certifications
- PTO Days for Volunteering
- Healthy Lifestyle & Custom Workspace

B-Corp Status, Diversity & Inclusivity – Another Reason You Will Be Proud to Work at BSW:
BSW Wealth Partners is proud to be both a Public Benefit Corporation (PBC) and a Certified B Corporation. Certified B Corporations are for-profit companies seeking a better way to do business by meeting the highest standards of third party-verified social and environmental performance, accountability, and transparency. B Corp certification is part of a global movement that serves to redefine success in business so that companies aspire not only to be the best in the world, but best for the world. BSW's certification highlights our commitment to diversity, equity, inclusion, and gender equity.
BSW is a company based on merit and excellence that welcomes all races, genders, and sexual orientations.

We encourage applications from all qualified candidates, including:

- Traditionally under-represented populations within financial services.
- Parents returning to the workforce after extended career breaks.
- People with physical disabilities or limitations.
- Transitioning military service members and veterans.

Application Process:
Submit your CV/résumé and a cover letter to nmurphey@bsw.com. In your cover letter, please address the following:

- *In your own words (20 or less), describe what you think BSW does.*
- *What are the top three reasons you are the best candidate for this position and for BSW? Why are you interested in our firm and this industry? What aspects? Do you have any applicable professional experience?*