ONE CAPITAL MANAGEMENT, LLC

Associate | Client Services

Location: Westlake Village, CA
Job Type: Full Time
Area of Interest: Private Client

Company Description

One Capital Management, LLC ("OCM"), is a leading global wealth management firm that offers diversified wealth management services to private clients, endowments and foundations, investment companies, and institutions in the U.S. and Canada. OCM is well-positioned to tailor wealth management solutions for its clients through its wealth forecasting group and integrated investment management service.

Position Description

The Associate I Client Services supports an advisor or team of advisors. The Client Services team focuses on delivering the full scope of the firm's wealth and investment services to individuals, private clients, foundations, endowments, and investment advisors. The Associate | Client Services will play a key role in creating a simple and elegant service experience for our clients.

Specific responsibilities may include, but are not limited to:

- Maintain existing client relationships as a primary point of contact for inquiries related to account maintenance, cash management, distributions, and investment reporting.
- Assist the wealth advisor, financial planner, and internal departments (operations, investments, billing, etc.) to ensure client requests are executed within defined service level agreements.
- Research and resolve routine to moderately complex client issues leveraging internal support resources and/or escalate as appropriate to management.
- Participate in client scheduling and preparation.
- Attend client meetings, events, and seminars as needed.
- Prepare client account paperwork, including internal agreements, custodian forms, applications, and other client deliverables for processing.
- Coordinate new client onboarding activities including the collection of required documentation, partnering with internal operations teams on process execution, client household setup, welcome calls, and proactive communication with clients.
- Understand and adhere to outlined company policies and procedures to ensure client activities are handled with firm standards.
- Track and document client interactions, activities, and meetings in CRM, ensuring notes are input in a timely and compliant manner.
- Develop and maintain trusted relationships with custodian partners, vendors, client professional contacts, and service providers.
- Participate in team projects and business initiatives and engage in training and education opportunities as required.

Job Requirements

- A Bachelor's degree is recommended, preferably with a concentration in Business, Finance, Economics, or a related field.
- Ideal candidates may have 1-3 years of experience working in investment advisory, asset management, or a financial services company.
- Excellent communication skills with the ability to develop and maintain strong relationships with clients, prospects, and team members across the organization.
- Strong organization and attention to detail are essential with the ability to prioritize and multi-task effectively in a fast-paced environment.
- Proficiency in using Microsoft Office (Outlook, Word, Excel). Experience with Tamarac Advisor View, CRM (Salesforce), and custodian websites (Schwab, Fidelity, Pershing, NBIN) is valuable.

Compensation & Benefits

- Salary range: $69,000 - $75,000
- Performance Based Bonus
- Flexible and responsible paid time off (PTO).
- Participation and coverage under the company health care plan.
- Participation in the company 401(k) Plan.
- Reimburse up to $75 monthly for a membership fee for the company Wellness Program.
- Company sponsorship in continuing education.

Interested applicants should submit their resume to hiring@onecapital.com.