

Client Service Associate (Texas)

The firm seeks a Client Service Associate with the ability to work well with other professionals in a team environment to provide services in the areas of investment analysis, gift and estate tax planning, risk management, and family office support to the Firm's clients. We are seeking individuals who are self-motivated, detail oriented, intellectually curious, and highly professional. Candidates should demonstrate a genuine willingness to understand each client's unique background, financial objectives, and goals. In addition, we are seeking candidates that understand the importance of responding to client queries in a timely manner and can manage priorities in a fast-paced environment. Exceptional organizational skills and the proficiency to transition seamlessly between tasks are a must.

Qualifications: Master's degree (MS, MPA, MBA) in Finance or Accounting; CFA, CFP, CPA, and/or educational equivalent (MBA or higher); 3-5+ years' experience in the capital markets, wealth management and/or family offices ("Big 4" accounting experience preferred). Must have superior written and verbal communication skills and software aptitude. Series 65 license is a plus.

Essential Duties and Responsibilities include performing and supervising the following:

- Financial/Investment Analysis:
 - Review client financial reporting data
 - Analyze performance and historical data associated with client financial statements
 - Model various wealth transfer and cash flow strategies
 - Monitor client portfolio allocation and implement changes as appropriate based on client profile
 - Understand underlying business activities of portfolio investments
- Estate & Business Succession Planning:
 - Identify weaknesses in current estate plan and work directly with estate planning attorneys to rectify
 - Initiate legal work and facilitate meetings with estate planning attorneys
 - Review client wills, trust documents, and business formation documents and summarize graphically
 - Provide comments on document drafts
 - Chart family business entities to show inter-relationships and work with relationship managers to evaluate tax consequences and increase asset protection
 - Research trusts and estate planning topics and stay current on relevant legislation
 - Project income, gift, estate and generation skipping transfer taxes
 - Oversee governance for client entities
- Risk Management
 - Review existing policies due diligence to assess life insurance alternatives in a client's overall estate plan
- Family Office:
 - Maintain client data and records
 - Prepare and update client balance sheets
 - Facilitate partnership and trust distributions
 - Oversee treasury management
 - Coordinate capital call funding
 - Manage account opening process
 - Provide tax preparers with relevant tax information
 - Monitor compliance with debt covenants