

Blue Prairie Group, LLC

Client Service Associate Job Description

Title: Client Service Associate

Location: Chicago Loop

Status: Full-Time

Compensation: Competitive Salary

JOB DESCRIPTION

This position supports consultants and investment analysts who deliver both strategic plan design and investment consulting services to institutional clients. In addition, the person selected for this position will work directly with our wealth management clients. The candidate should be a dedicated, detail-oriented, energetic individual who knows and loves the financial industry and wants to be exposed to many different potential career paths within the business. Specific major responsibilities are as follows:

- Coordinates services to clients and internal staff, such as scheduling conference calls and meetings, taking notes at client meetings, and managing our client database.
- Functions as the key point of contact for clients, manages client expectations, and coordinates the delivery of responses to issues as they arise.
- Supports the development and presentation of annual client business plans.
- Manages client expectations and coordinates the delivery of responses to issues as they arise.
- Drafts and edits client reports, presentations and other deliverables.
- Maintains knowledge of current legislative and market news, as well as industry benchmarking data.

DESIRED SKILLS & EXPERIENCE

The successful candidate must be willing and able to operate in Blue Prairie Group's client-centric and team-based culture. Our organization focuses on continuous improvement and employee development while emphasizing significant responsibility and accountability to clients and to each other. In addition, the successful candidate will specifically have a:

- Bachelor's Degree or equivalent required.
- Prior experience working in a customer service environment (internships, summer or work-study experience) is highly desired.
- Working knowledge of Microsoft Office suite of applications.

- Must demonstrate excellent oral and written communication skills, as well as the ability to use different media to communicate effectively.
- Must have excellent analytical, organizational, and problem-solving skills.
- Must be a self-starter and able to work independently, as well as being comfortable working with a team.

ABOUT BLUE PRAIRIE GROUP

We are an institutional investment consulting firm with a growing national practice. We are adding a Client Service Associate to our downtown Chicago office staff of energetic, engaging professionals.

Blue Prairie Group is an independent, fee-only retirement and investment firm with three core practice areas: ERISA, Foundations & Endowments and Wealth Management.

We are recognized as one of the premiere retirement and investment consulting firms in the country. Inc. Magazine recently named us one of the fastest growing, privately held companies in the country and Registered Rep Magazine named Blue Prairie Group one of the top 50 independent Wealth Manager RIA firms in the country.

For more information about the firm and its services, please visit www.blueprairiegrou.com.

No phone calls, please. We will only consider candidates who submit their credentials via email.