



Client Service Associate

Boutique sustainable investment firm seeks Client Service Associate for full-time position. Applicant will join an entrepreneurial team operating from our main Boston, MA office.

About the Firm

Boston Common Asset Management is an investment manager and leader in global sustainability initiatives, specializing in long-only, globally focused equity strategies. We seek sustainable, long-term capital appreciation by investing in diversified portfolios of high quality companies, incorporating rigorous analysis of financial and environmental, social and governance (ESG) factors. As shareowners, we urge portfolio companies to improve transparency, accountability and attention to ESG issues. Boston Common managed over \$2.6 billion in assets, including sub advised assets, as of December 31, 2017. We currently have 36 employees in two offices. Boston Common, independent and employee owned, is committed to a diverse workforce and encourages employees to participate in community and social outreach.

Duties

The Client Service Associate will work closely to provide support mainly to the Client Relationship Team, but also to Business Development, ESG and Portfolio Management teams as Boston Common strives to provide exceptional service for clients and consultants. Working in a collaborative environment, you will work with both institutional and High Net Worth (HNW) client base.

Specific responsibilities include but are not limited to:

Support Client Relationship Managers (CRM) in proactive client outreach and/or response to client inquiries. Activities include:

- Support timely Client / Consultant Communication
- Management of Client Relationship Database (Satuit)
- Maintain and Update Client Files
- Produce and/or assist in the production of client meeting materials
- Assist in on-boarding new client relationship including set up of electronic files, updating the Client Relationship Database and work with Compliance to execute appropriate client information, and conduct post-funding meeting
- Work with Compliance and Operation Teams as needed

Monthly and Quarterly support for Client and Consultant Reporting; Support project based activities

Qualifications

The position calls for a mature, trustworthy individual with high energy. Superior attention to detail and facility in working with data are crucial. The ability to think about next steps and implications in a process are also important. Strong organizational and communication skills are essential. The candidate must be a team player who can also work autonomously. The successful candidate will be able to handle multiple requests and prioritize effectively while maintaining a positive and flexible attitude. Enthusiasm for and knowledge of financial markets and sustainable investing would be a plus.

Must be proficient in Microsoft Office, including PowerPoint; experience with Satuit CRM and Advent would be a significant plus. At least one year of experience in an investment management firm or a related field is preferred, but relevant experience demonstrating the skills listed will be considered. Bachelor's degree is required.

Compensation will depend on experience and qualifications. Boston Common Asset Management offers a competitive benefits package, including medical, dental and 401k plans.

Boston Common Asset Management is committed to fostering a diverse and inclusive work environment because we believe diversity enriches our efforts and aligns with our integrated investment approach. Boston Common Asset Management is an Affirmative Action-Equal Opportunity Employer and does not discriminate on the basis of race, color, religion, sex, national origin, age, disability, military/veteran status, sexual orientation, gender identity or expression, marital status, genetic information or any other protected status.

To Apply: Send resume, salary requirements and cover letter to recruiting@bostoncommonasset.com using subject line "Client Service Associate". No phone calls please.