# Client Service Associate

Are you a driven, growth-oriented, socially conscious professional that thrives in an entrepreneurial environment? Want to work alongside thought leaders at a growing, world-class, mission-driven B Corp with a history of delivering strong investment performance and generating positive social and environmental impacts? Boston Common Asset Management is looking for motivated professionals to join our inclusive and collaborative "Best For The World™" team. Read on about our available roles and join us in making a positive impact.

**About Boston Common**
Boston Common Asset Management (BCAM) is a diverse, women-led, sustainable investor and innovator dedicated to the pursuit of financial return AND social change. An active, global equity ESG investment manager and a leader in impactful shareowner engagement since its founding in 2003, BCAM is majority women- and employee-owned. BCAM is headquartered in Boston, MA, with offices in San Francisco, CA. The company's investment strategies totaled $5.6 billion in assets as of June 30, 2021.

**Job Description**
The Client Service Associate role works closely with the Relationship Management and Business Development Teams to provide exceptional service for Boston Common's clients and consultants. In addition, the role offers internal client service to each team within the firm. The Client Service Associate will work with both institutional and High Net Worth (HNW) clients and their intermediaries in a collaborative environment. Specific responsibilities include but are not limited to:

1. Proactive Client / Consultant Services:
    - Client/consultant outreach (annual meetings, webinars, ad-hoc as needed)
    - Client requests (account setup/closing, cash flows, gifting, tax management, etc.)
        - Receive requests and communicate with clients
        - direct Ops to process requests
    - support and develop client plans by client track (intermediary, client, blended)
    - communicate in alignment with clients' ESG/Engagement interests
    - Present clients new opportunities that may be of interest (new strategy, engagement opportunities etc.) via email or phone calls
2. Proactive and responsive Internal Client service:
    - Pre-call preparation
        - Meeting materials preparation and setup/logistics
        - Provide current information regarding clients (web search, past notes, news stories etc.)
    - Support the Sales/Business Development process
        - Work with Business Development team to provide materials, content, follow-up where needed
3. Source competitive analysis when needed
    - Cross-functional work across the firm with Business Development, Compliance, Operations, Investment, and ESG teams.
4. Management of Client Relationship Database (Salesforce)
    - Facilitate the transition from prospect to clients: Serve as "quarterback" for new client/account onboarding process

- Facilitate and track client relationships, accounts, communications, requests, etc. in Salesforce
- Communicate with the Operations team on all client accounts/requests via Salesforce

5. Client Reporting
   - Monthly - deliver custom reports for select clients
   - Quarterly – support the quarterly production cycle;
     - deliver custom reports
     - Maintain and Update Electronic Client Files
   - Support project-based activities as needed

**Qualifications**
The position calls for a mature, trustworthy individual with high energy. Superior attention to detail and strong organizational and communication skills are essential. This position requires the ability to ensure both accurate and timely completion of tasks. The individual must demonstrate the ability to anticipate and solve problems, as well as think about next steps and implications in a process.

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 are a plus.

Must be proficient in Microsoft Office, including PowerPoint; and Excel. Experience with Salesforce and Advent are a significant plus. At least 2-3 years of experience in an investment management firm or a related field is preferred, but relevant experience demonstrating the skills listed will be considered.

**Compensation**
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 a committed 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 and cover letter to recruiting@bostoncommonasset.com
using subject line “Client Service Associate”. No phone calls, please.