

Client Service Associate

Please note, candidates must include a cover letter and salary requirements when submitting their resume. Submissions that do not meet these requirements, will not be considered.

Rockit® Solutions is a leading data aggregation and reporting solution for single-family & multifamily offices, registered investment advisors, private trust companies and other financial institutions. Our software consolidates account data from multiple sources, focuses on data integrity, reconciles discrepancies, and offers flexible reporting. Our company culture is one that Rockit prides itself on, as we continue to uphold an atmosphere that encourages professional development, a team oriented environment and an excellent work-life balance.

We are currently looking for an Entry Level Operational Client Service Associate (CSA) to join our Rockit Team to serve as the first point of contact for any client related inquiries. The position is actively involved in resolving client inquiries, both internally and externally. The CSA is responsible for prioritizing and completing daily deliverables for multiple client relationships and managing open inquiries. The successful candidate will be able to reassess priorities as situations arise for multiple clients.

Additional Responsibilities:

- Serve as primary backup for other Service Associates when necessary.
- Ensure all proper procedures and practices are being adhered to.
- Coordinate with clients regularly to ensure accurate posting of daily cash activities.
- Communicate with other departments within our organization to help supervise the daily processing of data in all accounts, ensuring accuracy and timeliness.
- Keep Relationship Managers apprised of all client situations.
- Manage client expectations by properly balancing needs with deliverables and scope of services provided.

Skills & Knowledge:

- BA/BS required. Degree in finance, accounting, economics or statistics strongly preferred.
- 3-5 years' prior client service experience in banking or finance industry required
- Prior experience with Partnership or Fund Accounting preferred
- Strong mastery of Microsoft Office, especially Excel
- Basic understanding of investments and/or portfolio accounting preferred
- Ability to excel independently or as part of a team
- Can communicate effectively and transfer thoughts into expressed ideas

Position Benefits:

- Competitive salary with 401(k) and company match
- Excellent health benefits (Medical/Dental/Vision)

- Flex spending accounts
- Tuition reimbursement
- Personal Gym reimbursement
- Free Gym onsite
- Free Pizza Fridays and onsite Happy Hours
- Free Coffee and stocked pantry onsite

Please visit www.Rocketco.com for more information.