Salient

Client Service Associate

The Client Service Associate will be primarily focused on providing exceptional and timely customer service to financial advisors and individual investors in Salient's registered hedge fund of fund complex. Customer service responsibilities include answering inbound calls and responding to written email inquiries for Salient's affluent investor base. This individual will also be called upon to provide internal support to the sales team, including but not limited to executive administrative responsibilities, administrative support for institutional sales professionals, event planning needs for various conferences and events throughout the year, and ad hoc support as determined by sales management.

Primary Responsibilities:

- Provide excellent customer service to investors and financial advisors in Salient's registered hedge fund of funds complex
- Offer operational support for financial advisors in regard to mutual funds, SMA, and private fund inquiries
- Respond to inbound calls and written inquiries in a professional, polished and polite manner
- Document all activity in the CRM within prescribed timeframe
- Maintain general inboxes for team to ensure timely and appropriate responses
- Coordinate event planning needs for distribution team, including conferences and events, Investor Forum(s) and annual sales training
- Provide executive administrative support including but not limited to calendar management, travel coordination and expense reporting
- Manage administrative needs of institutional sales professionals, including but not limited to printing/binding, meeting preparation and data entry
- Deliver ad hoc support to the sales team as needed by sales management

Skills & Qualifications:

- Excellent customer service skills, experience with affluent, sophisticated client base
- Proficient with Microsoft Office Suite- Intermediate level• Experience in a financial environment is preferred
- Professional, with polished oral and written communication skills
- Strong commitment to learning - a perpetual learner
- Ability to learn and articulate complex information to share with investors and FAs
- Experience with or ability to learn how to utilize expense management & travel tools
- Must be adept working with tight deadlines and meeting Service Level Agreements and deadlines
- Comfortable working in a competitive, professional financial services environment
- Highly skilled at teamwork and collaboration
- Well organized and capable of managing multiple disciplines at the same time
- Desire candidates with experience working in a financial services and/or professional sales environment
- Customer Relationship Management (CRM) experience such as Salesforce is desired

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Required Education:
Ideal candidates will have:

- BS/BA from an accredited college or university
- Minimum 1-3 years in a professional business environment
- Ability to obtain Series 7 license in 90 days and Series 66 within 180 days post hire

Working Environment:

Heavy telephone work interacting with investors, vendors, airline and expense management and sales professionals; must be adept with MS Office Suite's Excel, Word & Outlook.

Additional Responsibilities:

Other related duties as assigned.

Supervisor Responsibility:

None

Reports To:

Director, Head of Internal Sales

Travel:

None at this time

Primary Location:

Houston, TX

Schedule:

This is a full-time position. (40hours/week)

Contact:

Please contact Roz Davis, Senior VP of Human Resources to apply:
careers@salientpartners.com