

## **Manager, Client Services**

### **Job Description**

Truepoint, Inc. is a fee-only wealth advisory firm located in Cincinnati, OH. We have an opening for a full-time salaried position as a **Manager, Client Services**. This individual will direct the Client Service function. Responsibilities include, but are not limited to:

### **Custodian Interface**

- Direct and support client service staff
- Measure, track and report the results of key service performance measurements
- Resolve escalated problems related to client service
- Participate on Fidelity's Advisory Council Service Team, including monthly telephone calls
- Support the Wealth Advisory Team in addressing client questions regarding service or the custodian
- Develop and maintain procedures for all functions within Client Service
- Proactively update team members regarding improvements or best practices at the custodians

### **Client Communications**

- Coordinate and supervise mass mailings (hard copy or email) to clients and centers of influence
- Ensure quarterly reports are uploaded to the Secure Client Website on a timely basis and clients notified accordingly

### **Educational and Professional Designations**

Bachelor's degree (B.A.) from four-year college or university in business or a related field and two to four years related experience, or an equivalent combination of education and experience. Experience with brokerage or custodial platforms a plus.

### **Candidate Profile**

High level of energy and drive, a self-starter, enthusiastic, with both the motivation to be highly successful and a good sense of humor. Organization, attention to detail, dependability and a commitment to client satisfaction are critical. Position also requires the ability to multi-task, provide direction, establish professional relationships and act as a team player.

### **Compensation**

The success of our firm is a direct result of our outstanding team of professionals. Consistent with our objective of maintaining and growing an exceptional team, our compensation and benefits package is designed to attract and reward excellence.

For confidential consideration, forward your resume with salary requirements by mail or e-mail to: **Truepoint Capital, 4901 Hunt Road, Suite 200, Cincinnati, OH, 45242, Attention: Katrina M. Hartsel or [k.hartsel@truepointcapital.com](mailto:k.hartsel@truepointcapital.com).**

**TRUEPOINT, INC. IS AN EQUAL OPPORTUNITY EMPLOYER**