



## **Client Service Administrator (CSA) Job Description**

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Livian & Co. a growing wealth management firm formed in 2010 by a group of investment professionals, is seeking a CSA to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our organization!

Our mission at Livian & Co. is to help our clients achieve peace of mind and a fulfilling life. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

### **About the Culture at our Firm**

Our culture is one focused on integrity, client service, innovation, rigor, compassion and wellness. If you value these qualities in your own life and seek to experience them in your career, this position may offer you an exciting opportunity to join in an inspiring journey in a casual and friendly environment.

### **Description**

The CSA plays a critical role in the operations functioning of our firm. With responsibility for the day-to-day operational duties of the firm, the candidate assists the head of operations and our portfolio managers in running the business smoothly and enhancing our relationships with clients. We value our employees and support them in their personal and professional growth (CFA, CFP). Extensive training will be provided.

### **Responsibilities & Activities**

- Preparing, presenting and discussing portfolio and administrative reports to the team
- Corresponding with, talking to and servicing clients
- Loading trades on our systems and verifying their accuracy
- Running and maintaining our digital advisory platform (LivX).

### **Knowledge, Skills, & Abilities**

- Requires:
  - Excellent attitude and an extraordinary client service orientation
  - A strong focus on getting the details right
  - Excellent organizational and time management skills
  - An ability to handle multiple tasks within tight time frames
  - Proficiency with Microsoft Office Suite
  - Strong analytical and research skills
  - Strong verbal, written, presentation, and interpersonal communication skills
  - Bachelor degree (in a finance related field from an accredited institution)



- Helpful:
  - Knowledge of Bloomberg Professional Services
  - Interest in and knowledge of financial markets and investment securities
  - Previous securities industry experience

Attendance is an essential function. Salary is commensurate with experience. Benefits include: flexible work hours, health insurance and 401k options.

We offer a great working environment. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational, and focused on improving our client's lives.

For more information about our company, please visit our website: [www.livianco.com](http://www.livianco.com)

If you're interested in this opportunity, please send your resume and letter of interest to [rroman@livianco.com](mailto:rroman@livianco.com). Given the high demand for this position, we're only able to contact the most qualified candidates.