

Sales Assistant/Client Services Representative

Halbert Wealth Management (“HWM”) is a nationwide, Austin-based boutique investment company. We are looking to hire an individual to join our team as a Client Services Representative. The person hired will work directly with our Investment Representatives and high net worth clients.

HWM was founded in 1995 to give investors access to the strategies and advantages that have typically been used by major institutional investors. We invest in a variety of alternative, actively managed strategies that strive to give growth regardless of market conditions. We are independently owned and operated and not tied to a huge corporation.

What you’ll do at HWM:

- Work closely with our investment team to open and service client accounts.
- Provide support to investors and resolve investor-related issues in a timely manner.
- Partner with our investment managers to ensure that client accounts have been properly invested.
- Review manager strategies and account statements to prepare performance statistics.

What qualifications we’re looking for:

- Ideally, work experience in the investment or banking industries.
- High attention to detail, follow-up and organization.
- Strong computer skills, especially Microsoft Word, Excel and Outlook.
- Prior use of a computerized client relationship management system (CRM).

Extra consideration if you have:

- 1-2 years financial services experience
- Bachelor’s degree in finance or economics
- FINRA Series 65 license

You could be a great fit for us if:

- You have good communication skills. Wait! Everybody says that! But seriously, your emails and conversations need to be professional yet friendly.
- You have experience in customer service and enjoy talking with people.
- You can prioritize multiple projects and complete them in a timely manner without neglecting the details.
- You go above and beyond expectations not because it’s expected, but because you want to excel.
- You are looking for a position with the opportunity to advance in the investment field.

You might NOT be a fit for us if:

- You need the predictability of focused corporate job.
- You lack customer service experience.
- Your computer skills are outdated.
- You don’t have the ability and desire to develop a full understanding of our business.