



MERISTEM FAMILY WEALTH

FAMILY BEYOND THE NUMBERS®

Meristem is a federally-registered investment advisory firm founded in 1999 with offices in Minnetonka, Naples, Scottsdale and a South Dakota based Trust Company. Meristem is a boutique firm with the scale and structure to serve multi-generational families in the management of their wealth and the development of their legacy. The firm is intentional about offering an alternative to working with large institutions. We place a high value on our independence. We focus on people first. As a service business, our people are our assets. Engaging our clients and employees is our highest priority.

POSITION SUMMARY: INFORMATION TECHNOLOGY ASSOCIATE

The Information Technology and Systems Associate will support and maintain the technology systems at Meristem. This includes assistance across a wide range of areas including hardware and software support, desktop support for local and remote users, coordination and planning related to IT vendors, issues, and projects; management of databases, underlying data, and report writing.

I. ESSENTIAL JOB FUNCTIONS and DUTIES

To perform this job successfully, an individual must be able to perform each essential duty.

A. Desktop & Information Systems Support

- Provide “white-glove” IT desktop support to Meristem’s 40+ users
- Maintenance and configuration of Meristem’s technology systems
- Work with vendors and users to troubleshoot and resolve issues, document solutions
- Install and maintain hardware and software; manage and document inventory
- Assist with training materials and educate users on new and existing technologies

B. Vendor Planning and Coordination

- Assist in coordination of technology vendors
- Facilitate and maintain service contracts including service of internet, hardware, software, security, printers, and phone systems
- Create training materials and programs. Train new and existing employees with systems, processes and applications as needed
- Develop and revise process and procedure documents

C. Database Management & Reporting

- Salesforce data management and reporting
- Design, build, and test CRM workflows
- Work with other teams to assist in data-sensitive projects

D. Security & Compliance

- Assist with regulatory data compliance and cybersecurity initiatives
- Assist with validating and updating Disaster Recovery Plans
- Assist with the cyber security training program
- Monitor and assist with device compliance and security

Other duties *may be* assigned

II. REQUIRED KNOWLEDGE, SKILLS AND ABILITIES

A. The requirements listed below are representative of the knowledge, skill, and/or ability required in this job position.

- Self-starter with ability to operate in a fast-paced environment
- Solve complex technical issues with the ability to present ideas in user-friendly language
- Strong interpersonal communication skills – listening, writing, verbal
- Ability to quickly learn new technologies and skills as needed
- Resourceful, adaptive to change, flexible, able to prioritize competing demands
- Desire to serve others and able to adjust approach based on end-user sophistication
- Prefer working knowledge and familiarity with the following:
 - Microsoft Office Professional Suite / Office 365
 - Basic computer hardware
 - Exposure to networks Routers, Switches, and Firewalls
 - Active Directory
 - Salesforce CRM

B. Represent Meristem's Core Values

- Client-first mentality
- Passion for the craft
- Humble
- Driven to succeed
- Own it Together - collaborative and responsible
- Evolving and innovative

III. MINIMUM EDUCATION AND EXPERIENCE

- Associate or Bachelor's degree in Information Technology or related field, such as Computer Science, MIS, or Corporate IT Systems
- 2-4 years in a professional setting
- Experience with end user support preferred, but not required
- Financial services industry experience preferred, but not required

IV. PHYSICAL DEMANDS

The physical demands described herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing all duties of this job position, the employee must be able to work at least 8 hours per day and must be able to communicate with the public. He or she is regularly required to sit; stand, bend from the waist, write, lift and transport moderately heavy objects such as computers and peripherals; and operate the computer and all office equipment, use the phone; speak intelligibly; and hear.

This job description is intended to describe the general nature and level of work being performed by employees assigned to this position. It is not intended to be an entire list of all activities, tasks and skills required of employees in this position.

DATE: OCTOBER 2021
INFORMATION TECHNOLOGY ASSOCIATE
Fulltime/exempt
Department: Corp. General Admin
Reports To: Manager, Technology and Systems
Job Location: Minnetonka, MN

Signatures indicate agreement that this description accurately reflects job-related information.

Employee

Date

Manager

Date