**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: ASSOCIATE, CLIENT ADVISOR

The Associate coordinates and manages information and operational aspects regarding client relationships, working closely with internal team members, clients and their fiduciaries.

## I. ESSENTIAL JOB FUNCTIONS AND DUTIES

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

### A. Client Relationships

- Supports high touch client relationships through monitoring project timelines, communicating with client team members and preparation of materials for meetings
- Monitors and follows up on execution of transactions and completion of client projects
- Coordinates financial information with client fiduciaries, attorneys, CPAs, etc.
- Assisting in maintaining client communications

### B. Financial and Reporting

- Assists Senior Associates and Client Advisors by compiling financial information and preparing presentations for prospect and client meetings
- Assists in the coordination of ongoing investment portfolio management by understanding the clients' financial goals and objectives
- Assists in monitoring client accounts to cover cash flow needs of clients
- Understand Meristem's investment philosophy and how to incorporate in clients financial objectives appropriately

### C. Operations

- Partners with the client service team to coordinate the onboarding of client families
- Maintains a high level of compliance standards at all times
- Conducts research and analysis with regard to client financial goals across disciplines offered
- Maintains organization of client action items and financial information using Salesforce

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.

- Understands and complies with SEC and other company required rules and regulations
- Demonstrates effective speaking and presentation skills
- Strong writing proficiency and excellent communication skills
- Demonstrates strong numerical aptitude
- Possesses outstanding organizational skills and the ability to manage and balance multiple projects simultaneously
- Demonstrates initiative, problem solving ability, and adaptability and flexibility
- Ability to work independently without direct supervision
- Excellent interpersonal skills with the ability and desire to work on a team
- Proficient with MS Excel, Word and MS PowerPoint

B. Represent Meristem's Core Values

- Client-first mentality
- Passion for the craft
- Humble
- Driven to succeed
- Collaborative and responsible
- Evolving and innovative

## III. MINIMUM EDUCATION AND EXPERIENCE

- BA in Finance, Accounting or related degree
- Two to three years' experience in financial services or related industry
- Interest in financial planning and client service
- Actively pursuing CFP® designation desired
- Experience with Salesforce, Tamarac Reporting and/or MoneyGuidePro is a plus

## 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, 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: February 2022
ASSOCIATE, CLIENT ADVISOR
Fulltime/exempt
Department: Client Advisory
Reports To: Associate Team Manager
Job location: Minnetonka, MN

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

_______________________________________ _________________________
Employee Date

_______________________________________ _________________________
Manager Date