

ABOUT ALLODIUM:

We are a small employee-owned company that provides comprehensive wealth and fiduciary management services to help individuals and small organizations achieve their goals and simplify their financial lives. We launched Allodium to provide the best financial advice and personal service to a limited number of clients, mostly in the Twin Cities area. We believe exceptional advice avoids conflicts of interest to align with our clients' best interests. To this end, Allodium is a fee-only Registered Investment Advisor (RIA) independent from banks, brokerage firms, mutual fund companies and other financial service providers.

We believe in building an open and inclusive culture where we embrace others as their authentic selves. Applicants will receive consideration without regard to race, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age or veteran status.

To learn more about Allodium, please visit our website at www.allodium.com.

JOB PURPOSE:

Provide exceptionally friendly, helpful, high-quality and responsive service to our clients to maximize their satisfaction and earn their trust and confidence for long-term relationships.

RESPONSIBILITIES:

- 1) Client Service - (75%): Deliver exceptional service to assigned clients, and serve as back up CSA for other clients:
- Independently and professionally handle client requests and client account maintenance activity for existing clients.
 - Help schedule and prepare for client portfolio review meetings.
 - Help ensure our main phone line is always covered by a live person during Allodium business hours.
 - Send annual review booklets to clients.
 - Review daily client account transactions for accuracy and verify deposits and other funds for investing.
 - Execute trades for assigned clients.
 - Ensure that client-related data is accurately maintained in our client relationship management (CRM) system, performance reporting system and document management system.
 - Actively serve on Client Service Committee and other relevant committees based on duties and interests.
 - Independently manage and/or assist with client-service related projects.

- 2) New Client Onboarding - (15%): Serve as a key player in onboarding new clients:
- Inform firm of potential prospective clients when applicable. (Bonus is available for referrals who become clients.)
 - Help Wealth Advisors with client onboarding activities and with setting up new client accounts.
 - Independently manage onboarding tasks and ensure incoming account transfers are completed properly.
 - Ensure that new client-related data is accurately set up in CRM system and performance reporting system.

- 3) Operations and Other - (10%): Lead or assist with a variety of operational tasks to help firm comply with our regulatory obligations and operate efficiently:
- Assist with compliance-related activities, as needed.
 - Prepare client-related documents for scanning and assist with scanning documents for future reference, as needed.
 - Help maintain a professional and well-organized office environment to leave a positive impression with our visitors.

MINIMUM QUALIFICATIONS:

- BA or BS degree, ideally in business or related field.
- 3+ years of client service experience with demonstrated client-service orientation and excellence.
- Ability to reliably work full-time 40-hour-per-week schedule Monday - Friday.
- Ability to work in Minneapolis office several days per week with remote work on other weekdays.
- Pleasant, professional and friendly manner with excellent interpersonal skills with clients and peers.
- Strong team player.
- Highly organized with proven attention to detail.
- Demonstrated reliability and punctuality.
- Demonstrated flexibility, versatility and ability to simultaneously juggle multiple priorities and projects.
- Proven analytical and independent problem-solving skills.
- Highly proficient with Microsoft Office and other office software and comfortable learning new technology tools.
- Highly proficient with office technology like computers, copiers, printers, fax machines, scanners etc.
- Unquestionable personal and business ethics and integrity.
- Excellent written and verbal communication skills.

OTHER PREFERRED QUALIFICATIONS:

- 5+ years of client service experience in professional office environment, ideally in the financial services industry.
- Paraplanner or financial-planning experience and familiar with financial planning software.
- Experience with following websites and software:
 - Schwab Institutional website or similar custodian client service platform.
 - Black Diamond or similar portfolio management and performance reporting system.
 - Salesforce or similar CRM system.
 - Laserfiche or similar electronic document management system.
- Independent project management experience.

SALARY & BENEFITS:

Starting base salary commensurate with experience and qualifications. Bonus opportunity is available. Competitive benefits include paid time off and medical, dental, vision, life and long-term disability insurance and 401K with match opportunity.

HOW TO APPLY:

Please submit the following items to info@allodium.com for consideration:

- 1) Brief letter of introduction explaining your interest in this position and relevant key qualifications.
- 2) Resume.
- 3) Minimum salary and benefit requirements.