

## **GlobeFlex Capital, L.P.**

### ***Senior Client Service Associate***

GlobeFlex is a boutique equity investment management firm located in the La Jolla/UTC area of San Diego. We serve institutional investors, and need an organized, energetic, and highly resourceful individual for a full-time client service reporting position.

She/He will have laser-like attention to detail and the ability to manage multiple projects with differing priorities to meet deadlines. Ours is a dynamic, collegial, team-oriented environment, where everyone wears multiple hats.

Responsibilities include:

- Prepare and deliver client servicing materials, including standard and custom reporting items, due diligence questionnaires, ad hoc data/analytics and narratives, and client meeting presentations
- Populate databases/reporting portals
- Develop proficiency of relevant technology to extract data
- Respond to client requests in a warm, thorough and timely manner, collaborating across departments as needed to gather data and prepare responses
- Partner with the client service lead to onboard new clients and provide ongoing service to existing clients, including maintenance of client relationship information in the CRM system
- Ensure consistency across materials and communications
- Identify and develop efficiencies and improvements in processes

Desired Experience:

- 3-5 years of relevant work experience, preferably at a registered investment adviser serving institutional clients
- Solid foundation in equity investing concepts and ability to build knowledge of the investment, operations, finance, and compliance aspects of our business in order to effectively engage with clients and answer their questions
- Organized and detail-oriented with excellent proof reading skills
- Positive, productive, proactive, and great at juggling multiple responsibilities
- Able to work both independently and be a team player
- Can manage working closely with team members with differing styles, timelines, and priorities
- High ethical standards and accountability
- Understanding of relevant data and analytics, including portfolio accounting, performance reporting, attribution, risk metrics, portfolio characteristics, and quantitative factors
- Excellent communication and interpersonal skills, both written and verbal
- Proficiency with Microsoft Office is essential, particularly Excel and PowerPoint; familiarity with FactSet, eVestment, Portia, RFPIO, consultant databases, and/or Satuit CRM is a plus
- Great graphics skills a plus (Adobe Suite)

Requirements:

- Undergraduate degree in a related field

- Experience may offset academic requirements
- Excellent references

Compensation: Commensurate with experience

If interested, please email your resume and references to ***jobs@globeflex.com***

We are an equal opportunity employer.