ABOUT KNIGHTSBRIDGE WEALTH MANAGEMENT

Knightsbridge Wealth Management is a Registered Investment Advisor (RIA) headquartered in Newport Beach, CA with more than $800 million assets under management (AUM) and a 20-year history of helping clients achieve their financial goals. Our mission is to build a firm where we'd be happy to have our own family members be full-fee-paying clients, and we achieve this by living out our core values every day. These values include always doing what's best for the client, pursuing excellence in everything we do, treating each other well, and continuously adapting and improving.

CLIENT SERVICE ASSOCIATE JOB DESCRIPTION

We're looking for a motivated, fast-learning addition to our team. Reporting to the assigned advisor with additional guidance from the Sr. Client Service Associate, the position offers excellent exposure to executive leadership, multiple avenues for advancement at a growing firm, and the opportunity to learn about several facets of wealth management.

<u>The right candidate will:</u>

- Aspire to take on an increasing role in the Advisory team
- Uphold the highest standards of professionalism, integrity, and respect
- Demonstrate attention to detail, organization, and time management
- Excel in verbal and written communication
- Embrace a dynamic, fast-paced environment with a problem-solving mindset
- Be a self-starter and team player

<u>Responsibilities as the primary point of contact for maintaining successful client partnerships include:</u>

- Manage and lead the client onboarding process, including coordinating internal procedures and custodial account setup, requiring independent judgment to address unique client needs.
- Serve as a primary point of contact for client service requests, facilitating complex account transactions (e.g., deposits, withdrawals, account changes) and ensuring compliance with firm policies.
- Monitor and resolve daily custodial alerts regarding cash management, account updates, trading, etc.
- Administer alternative investments on behalf of clients, including preparing paperwork for signature and processing fundings and/or capital calls.
- Proactively engage with advisors to prioritize workload, provide client service updates, and escalate potential issues when appropriate.
- Design customized presentation materials and handle post-meeting deliverables.
- Collaborate with the operations team to streamline firm policies and procedures.
- Take on other duties as assigned.

<u>Qualifications</u>

- Undergraduate degree
- 2+ years of relevant experience working with high-net worth individuals at a Registered Investment Advisor, investment management firm, or broker-dealer
- Proficiency with Microsoft Office, Tamarac, Charles Schwab, and Fidelity

Knightsbridge
WEALTH MANAGEMENT

- SIE, Series 7/63/65/66 preferred

Benefits include:

- $80,000 - $100,000 salary
- Performance-driven annual bonus
- 100% coverage of employee health insurance
- 50% match of employee 401k contribution
- Three weeks paid vacation that increases with tenure
- One firmwide work from home day per week
- A fun annual company retreat