

Client Success Associate

Position Overview

Exciting opportunity for a client services professional to join a rapidly growing fund accounting firm! The Client Success Associate role plays a key role in helping to onboard new clients to Standish's fund accounting group. The Client Success Associate will be responsible for compiling and maintaining investor and engagement team information, file organization, and assisting with other client deliverables. This role will report directly to the Client Success Leads and Managers. High performers will have the opportunity to progress within the Onboarding Team.

Responsibilities and Duties

- Assist internal engagement teams with onboarding activities, such as providing access to folders, group mailboxes, and other engagement activities
- Compile and organize investor CRM information
- Assist Client Success Lead with standard template set-up for client deliverables
- Communicate and provide information to the technology team to set up client portals
- Assist with preparing LP communications
- Assist with client workspace set up within Standish's project management software
- Run Anti-Money Laundering (AML) reports and update AML database as needed
- Provide general administrative support to the Onboarding Team
- Collaborate with the Client Success Lead to develop and implement best practices for the Onboarding Team

Required Qualifications

- Bachelor's Degree or equivalent relevant experience required
- 1+ years of experience in a client-oriented office environment, preferably in a related industry
- Proficiency in Microsoft Office applications, particularly Excel, Word, and Outlook. CRM database experience a plus
- Excellent written and verbal communication skills (NOTE: candidates may be asked to draft a brief business email following an interview)
- Exceptional organizational skills and attention to detail
- Strong interpersonal skills with the ability to interact professionally with all levels of internal and external parties.
- Ability to work independently and exercise professional judgment
- Team player with a strong work ethic
- Adept using web-based data entry databases