

PORTFOLIO ADMINISTRATOR

Meyer Capital Management

Overview:

Meyer Capital Management (MCM) is seeking a full-time Portfolio Administrator to join our team. If you enjoy supporting others to help ensure productive operations and delighted customers, then we would love to talk with you. This Portfolio Administrator opportunity involves a diverse mix of administrative tasks, operations support, and client-facing communication. Responsible for initial client communication, this professional responds to client requests and interacts regularly with clients by phone and email. This team member also provides critical administrative support to our internal investment team to help ensure efficient, high quality and productive operations.

Why MCM?

Join a team that makes a positive impact in the lives of private clients through the effective management of their personal financial assets. This is both an honor and a responsibility that we take very seriously, and we approach each client with custom solutions and service unique to them. Your support will directly help our team and clients flourish as we continue down the path of a growth-oriented business strategy. We work hard, but also realize that you have a life outside of work, so we support that balance. We provide a competitive total rewards package that includes comprehensive health and related insurance, profit-sharing/401(k), paid time off, etc., and recognizes both individual and team performance. Below are a few other benefits of working at MCM:

- Small and supportive team-based environment
- As a growing firm, every role has a valuable impact on high-level, strategic company goals
- Ongoing performance management feedback and individualized incentive plans
- Daily morning huddles
- Active involvement in the local community

Key Responsibilities:

- Client service
- Account administration
- Investment team support
- Vendor relations
- Special projects as assigned

Position Summary:

- Provide comprehensive account administration, including opening, transferring and cashing
- Generate critical-path internal reports by compiling and organizing data from multiple internal and external sources
- Represent MCM as the first point of contact for incoming telephone and web-based inquiries

- Maintain databases for investment portfolio and client relationship management (CRM) systems
- Prepare client deliverables, including quarterly report materials and meeting presentation exhibits using Excel, Word, and internal portfolio management software
- Support relationships with external parties such as suppliers, accountants, et al. through routine interaction and special projects
- Manage / purchase office supplies and equipment

Minimum Qualifications:

- Bachelor's Degree in business, communications, or related field
- 2 or more years of relevant professional work experience

Desired Competencies:

- Attention to detail
- Ability to adapt quickly in a continually changing financial services environment
- Comfort using multiple technology platforms simultaneously
- Time management aptitude
- Strong communication skills
- Service-oriented values and mindset
- Supportive team player and stellar colleague
- Strong commitment to excellence in the areas of MCM's Core Competencies: Communication, Quality, Engagement, Innovation, Integrity

How To Apply:

Please submit cover letter and resume to: HR@meyercapital.com