

Associate | Client Services

Location: Westlake Village, CA

Job Type: Permanent Full Time

Area of Interest: Private Client

Company Description

One Capital Management, LLC (“OCM”) is a leading global investment wealth management firm that offers diversified wealth management services to individuals and private clients in major markets around the world. Through its integrated wealth management platform, OCM tailors wealth management solutions for its clients. OCM also offers investment and wealth management services for intermediaries and firms catering to private families.

Position Description

OCM Wealth Management is in search of an Associate | Client Services to join their servicing efforts. The candidate will provide support to an advisor or team of advisors. The Wealth Management team focuses on delivering the full scope of the firm’s wealth and investment services to individuals, private clients, foundations, endowments, and investment advisors. The Associate | Client Services will play a key role in creating a simple and elegant service experience for our clients.

Specific responsibilities may include but not limited to:

- Service Client Accounts: Opening/closing accounts, manage cash flows, client reporting/due diligence, and timely response to client inquiries.
- Maintain Client Relationship Management (CRM) database with client information.
- Create client presentations and communications.
- Provide general office support to advisors.
- Work with senior investment professionals and wealth analyst to develop client wealth forecast analyses.
- Liaise with various departments, including portfolio management, compliance, and operations.
- Assist with departmental projects and initiatives as needed.

Job Requirements

Candidates should have very strong communication and analytical skills, be highly organized, detail-oriented, demonstrate initiative, good judgment coupled with the ability to work well under pressure. An Associate should be able to work well both independently and within a team. The candidate must be able to prioritize work and handle multiple tasks to ensure that client requests are completed in a timely manner. College degree required.

Interested applicants should submit their resume to [hiring@onecapital.com](mailto: hiring@onecapital.com).

Compensation & Benefits

- Salary
- Bonus
- 401(k)
- Healthcare Benefits: Medical, Dental, Vision, Life insurance, Long-Term Disability
- Pet Insurance
- Wellness Program
- Continuing Education