ONE CAPITAL
MANAGEMENT, LLC

Executive Assistant | Client Services

Location: Westlake Village, CA
Job Type: Full Time
Area of Interest: Private Client

Company Description

One Capital Management, LLC ("OCM"), is a leading global wealth management firm that offers diversified wealth management services to private clients, endowments and foundations, investment companies, and institutions in the U.S. and Canada. OCM is well-positioned to tailor wealth management solutions for its clients through its wealth forecasting group and integrated investment management service.

Position Description

The **Executive Assistant I Client Services** supports the President of the firm, playing a key role in delivering a seamless and exceptional service experience for both internal teams and clients. This role includes a variety of administrative and client-facing tasks to ensure smooth daily operations and high-level client satisfaction.

Specific responsibilities may include, but are not limited to:

- Administrative Support for the President of the Firm
    - Calendar Management: Schedule and coordinate meetings, calls, and travel for the President. Ensure preparation for meetings, presentations, and other key engagements.
    - Email and Correspondence: Manage incoming emails and communications.
    - Document Preparation: Prepare reports, presentations, and business documents as needed.
- Confidentiality: Handle sensitive information with the utmost discretion and confidentiality.
- Client Relationship Management
    - Serve as a primary point of contact for clients regarding account maintenance, cash management, distributions, and investment reporting.
    - Research and resolve routine to moderately complex client issues, utilizing internal resources and escalating as necessary.
    - Prepare client account paperwork, including agreements, custodian forms, applications, and other required client deliverables.
    - Coordinate new client onboarding activities, including document collection, process execution, household setup, and proactive client communication.
- Tracking & Documentation
    - Maintain accurate records of client interactions, activities, and meetings in CRM systems, ensuring timely and compliant documentation.
- Collaboration and Professional Development
    - Participate in team projects, business initiatives, and continuous training opportunities to enhance skills and industry knowledge.

Job Requirements

- Excellent organizational skills with keen attention to detail and the ability to prioritize tasks.
- Strong communication skills, both written and verbal.
- Expertise in Microsoft Office Suite (Excel, PowerPoint, Word)
- Salesforce experience preferred.
- Bachelor's degree is preferred.
- 1-3 years professional experience is preferred.
- Familiarity with financial terminology and basic wealth management principles.

Compensation & Benefits

- Salary range: $72,000 - $85,000
- Performance Based Bonus
- Flexible and responsible paid time off (PTO).
- Participation and coverage under the company health care plan.
- Participation in the company 401(k) Plan.
- Reimburse up to $75 monthly for a membership fee for the company Wellness Program.
- Company sponsorship in continuing education.

Interested applicants should submit their resume to hiring@onecapital.com.