ONE CAPITAL
MANAGEMENT, LLC

Senior Associate | Client Services

Location: Dallas, TX
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

OCM is in search of a Senior Associate | Client Services to join their servicing efforts. The Senior Associate I Client Services will provide support to an advisor or team of advisors. The Client Services 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 Senior Associate | Client Services will play a key role in creating a simple and elegant service experience for our clients.

Specific responsibilities may include, but are not limited to:

- Maintain client relationships as a primary point of contact for inquiries related to account maintenance, cash management, distributions, and investment reporting.
- Create a simple, seamless, and elegant client experience.
- Collaborate with the wealth advisor, financial planner, and internal departments (operations, portfolio management, billing, etc.) to ensure timely execution of client requests.
- Research and resolve routine to moderately complex client issues leveraging internal support resources and/or escalate as appropriate to management.
- Assist with client meeting scheduling and preparation.
- Attend client meetings, events, and seminars as needed.
- Accurately prepare client account paperwork including internal agreements, custodian forms, applications, and other client deliverables for processing.
- Coordinate new client onboarding activities including the collection of required documentation, partnering with internal operations teams on process execution, client household setup, welcome calls, and proactive communication with clients.
- Understand and adhere to outlined company policies and procedures to ensure client activities are handled with firm standards.
- Maintain timely and compliant documentation of client interactions, activities, and meeting notes within the CRM system.
- Develop and maintain trusted relationships with custodian partners, vendors, client professional contacts, and service providers.
- Participate in team projects and business initiatives.
- Engage in training and education opportunities as required.
- Serve as the primary point of contact for office-related matters, including building management, maintenance, and service vendors.
- Manage inventory and ordering of all office and kitchen supplies.

- Ensure the office environment is maintained in a professional and organized manner.
- Handle incoming and outgoing mail and coordinate deliveries.
- Assist with the coordination of internal team meetings and office events.

Job Requirements

- Bachelor's degree, ideally in Business, Finance, Economics, or a related field.
- Ideal candidates may have 5 to 7 years of experience working in investment advisory, asset management, or a financial services company.
- Ideal candidate satisfied Series 65 or Series 66.
- Excellent communication skills with the ability to develop and maintain strong relationships with clients, prospects, and team members across the organization.
- Strong organization and attention to detail are essential with the ability to prioritize and multi-task effectively in a fast-paced environment.
- Proficient in Microsoft Office (Outlook, Word, Excel, PowerPoint).
- Experience with CRM systems (e.g. Salesforce), reporting platforms (e.g. Addepar), and custodian websites (e.g. Schwab, Fidelity, Pershing, NBIN, Goldman Sachs) is valuable.

Travel Requirement

This position is required to train onsite in Westlake Village, CA for two weeks.

Compensation & Benefits

- Salary range - $75,000.00 - $95,000.00.
- Discretionary Bonus
- Flexible and responsible paid time off (PTO).
- Participation and coverage under the company health care plan.
- Participation in the company 401(k) Plan.
- Reimbursement of up to $75.00 a month for membership fees paid as part of the company Wellness Program.
- Company sponsorship in continuing education.

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