



CLIENT SERVICES INTERN

The Client Services intern provides support to client service associates, senior members of the firm and the Fiduciary Officers in all aspects of administration of assigned client relationships. The intern will assist the team to ensure that client accounts are administered correctly via the Advent APX system.

The Client Services intern must possess strong interpersonal skills, organizational and time management skills, accuracy and attention to detail and a high level of proficiency. We are looking for a dependable person who is a critical thinker, flexible, motivated and has a strong work ethic. These qualities will be the key to success in this position.

The job responsibilities are:

- Assisting with preparation and mailing of new account documents
- Assisting with onboarding new accounts through Advent, a portfolio management system
- Reconciliation of new accounts on Advent APX
- Assisting with coordinating client tax packages with third party vendors, clients, CPAs and Attorneys
- Daily monitoring of cash, overdrafts and recurring remittances
- Assisting with creating and assembling client presentations
- Maintenance of client files; entering client data into client relationship system
- Daily phone coverage
- Assistance with incoming correspondence
- Special projects as assigned

The internship position is a paid position and offers flexible working hours (the number of weekly hours is negotiable). The position is an excellent path to gaining valuable experience working for a dually registered Broker Dealer and Investment Advisory company.

Winslow, Evans & Crocker, Inc. is a full service investment firm located in the heart of Boston's Financial District (near South Station).

Winslow, Evans & Crocker, Inc. is an Equal Opportunity Employer.

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