

STEGNER INVESTMENT ASSOCIATES, INC.

Client Services Associate

The Client Services Associate assists with the management of the daily activities within the Client Services Department. This position assists the operations and administrative staff in the performance of their duties, department processes, procedures, and protocols.

I. Major Responsibilities

A. Provide operational support for client accounts

1. Post and monitor daily download of transactions from custodians
2. Assist in communication with all custodians
3. Ensure SIA's system balances with retirement plan custodians
4. Assist in establishment of all paperwork & procedures for current & new clients
5. Conduct trades with custodians
6. Assist as needed in all areas of compliance

B. Provide investment support for client accounts:

1. Update client strategies and organizational reports in Excel periodically and upon request from portfolio managers
2. Assist in preparation of reports for client meetings
3. Assist in preparation and review of client quarterly mailings

II. Minor Responsibilities

Become a member of the SIA team

1. Assist other associates
2. Demonstrate reliability and trustworthiness
3. Be dependable and become an asset to the Firm
4. Explore opportunities to increase skills & knowledge of investments

Qualification Preferences:

- 4-year college degree in economics, finance or accounting and/or 1-3 years of experience with a registered investment advisor, brokerage firm, trust department or bank.