



Client Service Specialist

Bloom Asset Management is a 34-year-old Registered Investment Management firm providing professional money management for individual investors and businesses, specializing in no load mutual funds. We are seeking a professional, outgoing and motivated individual with exceptional communication skills to fill the role of **Client Service Specialist**.

The ideal candidate will have two years of experience in Banking, Accounting or Finance, preferably in an investment firm and/or financial services institution. This person will be focused on quality and exceptional client service along with the ability to do the following:

- Interact knowledgeably and professionally with clients, CPAs and fiduciaries
- Service existing and new clients: open new accounts, process deposits and withdrawals, wire requests, direct rollovers, account transfers, and facilitate with estate distributions
- Assist advisory team with portfolio rebalances

Qualifications:

- Knowledge of Microsoft Excel, Word, Outlook preferred
- Experience with mutual fund order entry preferred
- Bachelor's degree in Finance, Accounting or Economics preferred

Benefits:

- 401K with annual match, Health insurance with a Health Savings account and quarterly Bonus

Apply here: <https://www.indeedjobs.com/bloom-asset-management-inc>

No phone calls accepted.

***Bloom Asset Management** is an Equal Opportunity Employer and offers competitive pay and benefit programs and a teamwork environment in a growing company that has more than 30 years of excellence and integrity.*