
TITLE	LOCATION	CLASSIFICATION
Client Associate	Madison, WI	Full Time

Based in Wisconsin's capital city since its founding in 1974, Madison has grown from a local firm into a nationally recognized asset manager entrusted with assets across a suite of mutual funds, managed accounts and customized portfolios. The catalyst for Madison's growth has been a management style that looks beyond short-term trends, emphasizing the performance of investments over full market cycles. Our highly-credentialed portfolio managers, analysts and traders share a belief in high-conviction, risk-conscious investing, and have the autonomy to shape this approach within their own investment teams. For more information, please visit www.madisoninvestments.com

POSITION DESCRIPTION

We are currently seeking a Client Associate to join our growing business. This individual will work with our firm's sales staff to onboard clients onto our new client portal. The position will be responsible for training internal staff and clients on using this portal. Finally, The Client Associate will work with a team responsible for creating quarterly report content and streamlining the process. Resumes should be sent to jobs.ops@madisonadv.com.

Primary Responsibilities & Duties

- Work with internal staff to onboard clients onto the firm's client portal
- Train internal staff and clients on using the firm's client portal
- Research data discrepancies between portfolio accounting system and client portal
- Work as part of a team that is responsible for improving the process in creating, producing, and distributing monthly and quarterly reports
- Assist sales staff and portfolio managers with annual IPS reviews and compare to internal systems
- Create restrictions in Trade Order Management system
- Create specialized quarterly and monthly reports for clients

Qualifications & Skills

- Bachelor's degree
- 2-4 years of working experience and/or knowledge of the investment industry is preferred
- Excellent interpersonal, communication, and customer service skills
- Excellent organizational, time management, and problem-solving skills
- Possess technical expertise
- Strong computer, software and internet navigation skills; proficiency in Microsoft Excel
- Ability to work independently and as part of a team, and to exercise initiative, good judgment, and discretion
- Willingness to learn new things and implement process improvements

Benefits

- Comprehensive Benefits and Perks: health insurance, profit sharing, and a flexible work schedule
- Company Culture: collaborative, team-oriented, fast-paced, challenging and innovative