

Client Service Specialist

Background:

O'Shaughnessy Asset Management, LLC (OSAM) is a \$6.5 billion* (*as of 3/31/18*) equity asset manager. We are leaders in factor research and investing. We need smart, interesting and hard-working people to help us deliver for our clients.

Mission:

As a Client Service Specialist (CSS), you will work with the OSAM sales team and subject matter experts to accurately and effectively communicate information regarding our firm and strategies to clients, consultants and prospects. Maintaining long lasting client relationships is very dependent on excellent client service. Ensuring that we provide information that is important to our clients, in a timely manner is key to meeting our goal. **You will oversee critical aspects of this process.**

If you want an environment where you will learn fast and contribute towards the goal of the organization, then O'Shaughnessy Asset Management is the place for you.

Objectives:

As a Client Service Specialist, you will be responsible for the accurate and timely fulfillment of monthly and quarterly client reporting. This includes the completion and submission of specific standard reports and questionnaires. You will also lead process for completing all new business Requests for Proposals (RFPs) and Requests for Information (RFIs).

As a part of this process, you will ultimately be expected to author and clearly articulate information about our firm and strategies. Your resources will be our Portfolio Managers, Traders and Relationship teams. You will also serve as a key firm representative with clients and consultants and facilitate ad-hoc requests for information.

Your proactive ideas regarding ways to help clients, prospects and consultants better understand the value of our strategies would also be welcome.

Competencies:

- Self-motivated, proactive, analytical thinker and creative problem solver.
- Comfortable working in a fast-paced environment.
- Very strong writing skills.
- Ability to convey information clearly and simply (written and verbal).
- Detail oriented.
- Strong teamwork skills.
- Intellectual curiosity with an interest in the financial services industry.
- Strong knowledge of Microsoft Office programs such as Word, Excel, PowerPoint and CRM.
- Excellent interpersonal skills.
- Intellectually curious.
- Ability to multitask.

* As of 3/31/18. The AUM and AUA combined total represents \$6.0 billion of O'Shaughnessy Asset Management assets under management and \$0.5 of assets under advisement. The information regarding AUA is supplemental. OSAM does not have control over the assets under advisement, implementation of the models, or execution of the trades. Numbers may not add up due to rounding.

Qualifications:

- BA/BS degree required
- Experience in the asset management industry or with proposal completion is a strong plus.

OSAM's Mission:

We pursue a simple mission: learn, build, share, repeat. We constantly learn more about investing, build disciplined strategies to capture the best of what we've learned, and share our broad findings with other curious investors.

Through three decades, we've learned with our clients. We are always striving to improve the capacity of our platform—which includes our data, our proprietary research and portfolio management technologies, and a highly experienced team. Our goal is to deploy this platform for our clients' long-term benefit.

Our culture is one of curiosity. We hire and promote people driven by a need to understand investing, markets, and our industry, and who want to share the excitement of that process with others. Our goal is to bring together a group of knowledge seekers, who enjoy learning and always act with kindness and integrity.

By sharing most of what we learn, we hope to help investors of all types make better and more informed decisions, and ultimately build better portfolios. Experience has taught us that constant exploration is contagious. Through a commitment to education we hope to improve the investing discourse globally.

Please visit www.osam.com. Send all inquiries to careers@osam.com.