

Client Service Specialist

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.

Key responsibilities of the position include:

- The accurate and timely fulfillment of monthly and quarterly client reporting. This includes the completion and submission of specific standard reports and questionnaires.
- Lead the process for completing all new business Requests for Proposals (RFPs) and Requests for Information (RFIs).
- Author and clearly articulate information about our firm and strategies. Your resources will be our Portfolio Managers, Traders and Relationship teams.
- Serve as a 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.

Key Skill Sets:

- 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.
- Excel: Forms, Formulas, Functions, Pivot Tables, Graphs.
- Excellent people skills.
- Intellectually curious.
- Ability to multitask.

Qualifications:

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

Reporting Structure:

This position reports directly to Claudine Spence, Principal, Director of Client Services.

Location:

CT/NY area is preferred but not required. Working remote at least some of the time is expected.

About the Firm: O'Shaughnessy Asset Management (OSAM) is a research and money management firm based in Stamford, CT. On December 31, 2021, [OSAM was acquired by Franklin Templeton](#). We manage approximately \$7.0 billion* in assets for institutions and financial advisors. Our approach to managing money is transparent, logical, and completely disciplined, leading to long-standing relationships with our clients. We are a leading provider of [Custom Indexing services](#) via Canvas. Canvas is our proprietary platform that offers financial advisors an unprecedented level of control and ease in creating and managing client portfolios in separately managed accounts (SMAs). With Canvas, advisors can build custom investment templates, access factor and passive investing strategies, actively manage taxes, and apply ESG tilts and screens according to the specific needs, preferences, and objectives of individual clients.

For more information on our firm, please visit our website at www.osam.com. Applications should be submitted [here](#).

* As of 6/30/2022. O'Shaughnessy Asset Management's \$7.0 billion AUM and AUA combined total represents \$6.5 billion in assets under management and \$0.5 billion in 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.