

Client Service Associate

The Client Service Associate will be responsible for the operational set-up of new accounts, client onboarding, and transaction request follow-up for both the Financial Advisor Services and Institutional businesses. This individual will also assist with the onboarding of new RIA, custodian, and other platform relationships. The successful candidate will be considered a key problem-solving partner to our clients and our sales team. The need for this hire is driven by the growth with our Canvas offering. Canvas is a revolutionary Custom Indexing platform designed to improve the relationship between asset managers and allocators.

Key requirements of the position include:

- Ability to effectively problem solve in a timely manner.
- Must maintain a strong working relationship with both internal and external clients.
- Superior work ethic.
- Comfortable working in a fast-paced environment.
- Ability to manage multiple tasks effectively.
- Must have the ability to be pleasantly persistent when needed.
- Self-starter.
- Strong time management and organizational skills.
- Team player.
- Intellectual curiosity.
- Strong interpersonal, as well as strong written and verbal communication skills.

Highly Desirable:

- Bachelor's Degree or 2+ years of relevant work experience.
- Previous experience working in financial services and/or an asset management firm, a plus.

Compensation/benefits:

- To include salary, discretionary bonus, health insurance, vacation, and industry training.

About the Firm: O'Shaughnessy Asset Management is an independent, employee-owned research and money management firm based in Stamford, CT. The firm manages approximately \$6 billion in assets for institutions and high-net-worth individuals through their financial advisors. Pioneering equity researcher Jim O'Shaughnessy and his team of analysts have done extensive research over a period spanning more than eight decades to identify the characteristics for stocks that have led to successful investing based on absolute, risk-adjusted, and consistency of returns. Our approach to managing money is transparent, logical, and completely disciplined, leading to long-standing relationships with our clients.

For more information on our firm, please visit our website at www.osam.com. Resumes can be sent to careers@osam.com.