

Job title	<i>Client Solutions Consultant</i>
Reports to	<i>Client Solutions Director</i>

Job Purpose

The Client Solutions Consultant plays an important role on the client service relationship team. The primary responsibilities include performance measurement, reporting, and client administration / project support. The CSG Consultant supports multiple institutional client and plan types. The role requires an understanding of performance computations across public and private investments, various statistical concepts, and financial administration. The CSG Consultant must have the ability to prioritize, manage, and execute on multiple and diverse assignments simultaneously.

Duties and Job Responsibilities

- Obtain custodian and investment fund administrator data, enter data into the reporting database, and calculate performance results
- Generate client reports for various time periods including weekly, monthly, or quarterly
- Verify results with investment managers and resolve discrepancies
- Create and maintain compliance reports as described in the clients IPS
- Provide client administration support including review or drafting of letters and IPS
- Support ad hoc client request as it relates to performance, reporting, or administration
- Support consultants with meeting preparation
- Support new client onboarding
- Populate and maintain all internal systems as required
- Execute tasks as assigned by your supervisor
- Train and mentor team members
- Attend client meetings if requested

Required Skills

- PC proficiency including the Microsoft Office series of applications
- Strong written and verbal communication skills
- Strong attention to detail and the ability to recognize and correct errors
- Organized self-starter with the ability to multitask and manage time effectively
- Proficiency in researching and critical problem solving through available resources
- Familiarity with GIPS performance standards preferred
- Familiarity with Investment Metrics PARis system preferred

Qualifications

- Bachelor's degree from an Accredited University (Finance and Accounting majors are preferred).
- Minimum of five (5) years of relevant performance measurement experience across public and private investments.
- Master, MBA, or CIPM certification preferred.

Working Conditions

This job is located in Winter Park, Florida. Standard office hours 8a-5p. This is an Exempt position.