

## Clients first.



Job Title: Client Solutions Specialist

### Who We Are:

AndCo Consulting is an independent, SEC registered institutional investment consulting firm. We serve as a fiduciary to each of our clients, without exception or caveat, while assisting and guiding them in making important investment and plan design decisions.

### Job Summary:

The Client Solutions Specialist is responsible for performance measurement, reporting, investment policy monitoring, investment administration, and project support for client investment plans. The Client Solutions Specialist supports multiple institutional client and plan types. This role requires an understanding of time and dollar weighted performance computations and various statistical concepts across public and private investments.

### Responsibilities:

- Completes onboarding and setup of new clients including internal systems setup, historical performance input, and report creation
- Calculates and reconciles performance with investment managers and custodians
- Creates, maintains, and generates client reports on a monthly and quarterly basis
- Monitors adherence of the client's plan to the investment policy statement
- Provides client investment administration and project support

### Required Skills:

- Works with a high degree of accuracy and detail orientation
- Displays the ability to be highly organized and flexible with multiple priorities and changing deadlines
- Ability to think critically and solve problems leveraging available resources
- Solid understanding of mathematical computations
- High level of aptitude for software systems and Microsoft Office. Specifically, Excel, Word, PowerPoint, and Adobe/Foxit

### Qualifications:

- Bachelor's degree from an accredited college or university
- CIPM or CFA preferred
- CFA Investment Foundations Program required within 6 months of start date
- 5 years of relevant professional experience preferred

### Benefits of joining AndCo:

AndCo Employees enjoy opportunities to learn and grow alongside committed leaders and colleagues. In addition to a competitive salary, we offer the following benefits: Medical, Vision, Dental, Disability, Life insurance, 401(k) employer match, and 13 paid company holidays in addition to a generous PTO package.

### Equal Opportunity Employer:

AndCo is an Equal Opportunity Employer. We invite all qualified applicants to apply and do not discriminate against individuals because of their race, color, religion, national origin, gender, physical or mental disability, veteran status or age.

### Working Conditions:

This job is located in Winter Park, Florida. Standard office hours are 8:00AM-5:00PM. This is an exempt position.