

Punch

A BOUTIQUE INVESTMENT ADVISORY

Client Specialist

Punch & Associates Investment Management, Inc.

Punch & Associates Investment Management, Inc. is a Minneapolis-based, independent wealth and investment management firm serving a select number of institutions and families of substantial wealth. Our mission is to enable families and institutions to steward resources with clarity and purpose.

We are seeking a full-time Client Specialist to join our dynamic Wealth Strategies group.

Responsibilities Include, but are not limited to:

- Prepare, process, and complete all client forms and applications to support ongoing account maintenance, including:
 - Opening, closing and retitling accounts;
 - Transferring assets;
 - Updating account preferences and detail;
 - Money movements (deposits, withdrawals, EFT's, wires, checks and journals);
 - Gifts of stock, QCDs.
- Collaborate with advisors for proper client on-boarding and account set-up, including:
 - Monitor account activity for updates on asset flows, account modifications and other account alerts;
 - Provide requested tax documents for clients and tax preparers;
 - Assist with quarterly reporting process.
- Client assistance/education in using online interfaces.
- Manage client RMDs.
- Manage client periodic withdrawals/periodic investments.
- Other operations duties as needed.

Required Skills and Qualifications:

- Strong attention to detail a must.
- Ability to work in a fast-paced environment with tight deadlines.
- Self-motivated with ability to work both independently and collaboratively in a team environment.
- Excellent communication skills, both internally and externally.
- Strong organizational and time-management skills
- Ability to work with discretion and uphold confidentiality
- Bachelor's degree preferred but not required
- Experience in the Investment or Wealth Management fields preferred.

Company Benefits:

- Approximate salary \$60,000 - \$100,000
- Generous medical, dental, and vision insurance plan, 401k and Profit Share, PTO
- Opportunity to grow in the position and take on new responsibilities

Punch & Associates offers a competitive salary, people-first culture, and generous benefits package. Please submit a cover letter and resume to resumes@punchinvest.com.