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Beck Bode Wealth Management is a full-service wealth management firm headquartered in Dedham, MA, consisting of Certified Financial Planners (CFP®), Chartered Financial Analysts (CFA®) and private client managers, all collectively dedicated to delivering to clients the highest standard in financial advice, service, and investment management. Beck Bode Wealth Management is a FEE-ONLY wealth management firm. Our advisors are unfettered in their pursuit of representing the Fiduciary Standard: the requirement that a financial advisor acts solely in their client's best interest. Our advisors receive zero commissions from the recommendation of any financial products, striving always to provide unbiased and objective financial advice.

Posting Title	Client Relationship Manager / Private Client Concierge
Job Description	The Client Relationship Manager at Beck Bode Wealth Management is a team based position responsible for managing ongoing relationships with engaged clients. The Client Relationship Manager deepens client relationships through ongoing service and support. Responsible for the onboarding of new clients, account openings, transfers, and maintenance.
Responsibilities	ENGAGEMENT: Develop and deepen relationships with current clients. This includes developing rapport and driving a need based discussion to engage clients in an effort to understand their short and long-term financial needs. SERVICE: Manage work/time to optimize client interactions. Includes: preparing for calls to clients, setting and holding regular meetings with current and future clients, gathering and documenting information to ensure compliance requirements are met, facilitation of appropriate business processes and the monitoring of interactions and next steps. MANAGEMENT: Organize and manage office supplies. Support advisors by organizing up to date informational packets and getting them to current or future clients.
Required Qualifications	- PASSION for your work and PERSONALITY - Strong ability to work within a team like atmosphere - Consulting, influencing and client engagement skills - Excellent interpersonal and communication skills - Outstanding verbal, written, and listening communication skills - Superior customer service skills - Demonstrated ability to display and maintain a highly professional demeanor
Preferred Qualifications	- Bachelor's Degree Preferred - Previous relationship management experience - Previous office management experience

ALL INQUIRIES CONTACT:
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