



OSBORNE PARTNERS
Capital Management, LLC

Osborne Partners Capital Management is looking for a highly skilled Client Service Specialist to join our experienced team.

We are seeking a candidate who will service client relationships by providing exceptional service through ongoing communication, thorough attention to detail and continual enhancement of firm operations. This position is based in our Menlo Park office.

Qualifications include, but are not limited to:

- 4-year college degree with an emphasis in finance, accounting, business, economics, mathematics, or a similar field and strong analytical skills.
- At least 2 years of previous experience in the investment management or investment advisory/consulting industry.
- Previous experience in professional client service is required.
- Have excellent interpersonal skills and excellent verbal and written communication skills.

Responsibilities include, but not limited to:

- Monitoring the client relationship:
 - Act as a liaison between Portfolio Counselors and clients.
 - Provide client relationship management by monitoring client communications and initiating communication on a regular basis.
 - Communicate with clients verbally or in writing to inform or answer operational/administrative requests and inquiries and problem resolution.
 - Monitor and initiate service requests with custodians on behalf of client.
 - Assist client with stock option exercise, restricted stock deposits, cost basis research, client gifting, estate valuations and distributions.
 - Conduct monthly position reconciliation reviews for assigned client portfolios.
 - Prepare special reports, charts and graphs for client meetings as requested.

OPCM offers a strong compensation and benefits package. Benefits include medical, dental, and vision, along with 401K matching and a stock options plan.

To be considered for this position your resume must be accompanied with a cover letter summarizing your experience and why your background would be a good fit for the position. Please submit all documents to careers@osbornepartners.com. In addition, please include your salary requirements in your cover letter.

Thank you for understanding that no phone calls will be taken for this position.