



# BlackDiamond Financial

## Client Service Specialist Job Description

Black Diamond Financial, LLC is a private wealth management firm focused on preserving and enhancing wealth primarily through index investing strategies. We are seeking a Client Service Specialist for our Bend, OR office who has client service experience, ideally with a wealth management firm.

The Client Service Specialist will work within our financial planning team to fulfill client needs including account onboarding and servicing, money movement, presentation preparation and client communication. This position reports directly to the President and can lead to significant upward mobility within the firm.

### Key responsibilities include, but are not limited to, the following:

- Enhancing client relationships
- Working with our custodian, Charles Schwab, to open new accounts and onboard clients
- Completing account transfers including time sensitive ACH and wire transactions
- Managing our Bend office to ensure a pleasant client experience
- Communicating with clients to ensure their requests are quickly completed
- Assisting with the review and generation of client performance reports
- Support the team's marketing strategy by maintaining marketing materials, including digital and social media platforms, and planning client events and seminars

### Required Skills:

- Demonstrated history of exceptional client service
- High professional standards, honesty, and integrity
- Experience working at a wealth management firm (ideally with Charles Schwab as custodian)
- Resourceful self-starter, able to work autonomously and as team player
- Strong communications skills, both written and oral
- Highly organized with ability to manage a variety of transactions and projects simultaneously
- Strong work ethic and excellent attitude
- Sound judgment in dealing with clients
- Very high attention to detail

### Other Required Qualifications:

The perfect candidate will bring to the role an affinity for client services, a team-oriented approach and a strong work ethic. Other success attributes candidates should possess are:

- Bachelor's degree in Accounting, Business, or Finance
- At least 3 years of professional work experience
- Proficiency using Word, Excel and PowerPoint



# **BlackDiamond Financial**

**To apply, please submit your resume and a cover letter to [jblancon@blackdfinancial.com](mailto:jblancon@blackdfinancial.com)**

## **Firm Overview**

Black Diamond Financial, LLC is a private wealth management firm focused on preserving and enhancing wealth primarily through index investing and financial planning strategies. The firm's mission is to create an individualized index-based investment portfolio for each client that is risk-appropriate, returns-optimized and tax-efficient. We are also affiliated with an accounting and advisory firm to provide clients with robust resources and services. As an employee-owned firm, the company makes its clients' interests their highest priority.

Black Diamond Financial's investment philosophy adheres to decades of Nobel Prize-winning academic research, which has documented that market prices reflect the knowledge and expectations of all investors. The firm believes that new market developments are quickly reflected into a security's price, making it virtually impossible for traditional investors to consistently beat the market. Traditional investors rely on the speculative and unnecessary cost-generating activities of stock and/or manager selection, market timing and style picking. At Black Diamond Financial, the firm's index investing strategy employs a disciplined, low cost, and quantitative approach that emphasizes broad diversification and consistent exposure to publicly traded markets globally.