UBS Client Service Associate Job Description

As a Client Service Associate you provide analytical, operational, and administrative support to a UBS Managing Director/ Financial Advisor. Associates enhance the client experience by servicing clients and providing support to the Managing Director in their daily business practice, including but not limited to:

- Investment Analysis – Equity, Fixed-Income and Derivative-based asset classes
- Sales opportunity management and support
- Operational Management – performance reporting, disbursement processing, client reporting
- Daily interaction with clients
- On-boarding new clients
- Sales and Marketing support

Associates drive firm initiatives and will need to maintain high-level risk awareness and regulatory knowledge. The successful candidate will be a team player with a commitment to a high degree of client service. The individual in this role will be a key stakeholder in the business, responsible for essential positioning and communication directly with clientele. You should be detail oriented with proven organizational skills, able to manage time efficiently and can multi-task. Proven written and verbal communication skills are a must.

If you are Registered or become Registered in the first year (pass the Series 7, 66) you will also position products and services and represent UBS Financial Services Inc. and your Financial Advisor's business.

This position has a minimum one year commitment.