

**Client Service Associate**May 2021

Position: Client Service Associate
Department: Client Services Group
Status: Open
Office: Beijing

Firm Overview

Cambridge Associates is a leading global investment firm. We work with non-profit institutions, pension plans, and private clients to build investment portfolios that help them meet their philanthropic goals, pensioners' obligations, or personal endeavors. Our goal is to meet clients wherever they are in the investment process. We offer a variety of services to complement those needs, from acting as an outsourced investment office to providing access to our world-class digital research platform. Committed to independence since our founding more than 45 years ago, we are motivated only by what is best for our clients.

Our clients trust the experience, leadership, and integrity of our investment professionals. We have a global team of outstanding investment advisors and an extensive research platform to support them. With more than 1,200 employees in eleven locations around the globe, we are constantly looking to discover new ideas for our clients' portfolios. This extensive network helps us to identify and access the best global investment opportunities all over the world.

Department Overview

The Client Services Group (CSG) acts as central point of contact for clients, investment teams, and other internal stakeholders for all portfolio and operational matters. CSG members are responsible for onboarding new clients, managing and implementing investment decisions, coordinating the performance reporting process, and assisting clients with all non-investment decision related inquiries. The key objectives of the group include:

- Provide superior, solution driven client and investment team service
- Be innovative and seek opportunities to improve investment team efficiency and organization
- Ensure accurate and timely client/investment team deliverables
- Leverage local and global CSG peers to problem solve and share experiences
- Promote clear and concise communication to all relevant parties

Position Overview

The Client Service Associate will provide support to investment teams and clients in the aforementioned areas. Specific responsibilities of the Associate include, but are not limited to:

- Investigate and answer non-investment decision related client and investment team inquiries.
- Coordinate with investment teams to complete ad-hoc operational projects, provide supplemental portfolio analysis, and gather information to aid investment decisions.
- Efficiently lead the onboarding of new clients by proactively managing internal and external data and regulatory information requests and keeping a client centric focus.
- Engage with client contact(s), investment teams, and other internal CA business areas to ensure effective communication regarding the implementation of investment decisions.
- Enter approved transactions into internal trade order system, ensuring prompt and accurate processing by internal groups, and generally overseeing full transaction lifecycle.



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- Contact investment managers and/or custodians regarding individual portfolios (i.e. to execute investment decisions, to make changes in performance reporting criteria, to research manager terms, etc.)

Qualifications:

- BS/BA with experience in portfolio related operations
- Excellent oral and written English communication skills
- Exceptional problem solving, analytical, and organizational skills.
- Ability to work independently, and as part of a team (often located remotely) – with a professional, focused, and disciplined approach
- Demonstrated skill in project management and prioritization.
- Meticulous attention to detail and excellent oral and written communication skills.
- Previous experience with Private Equity/Venture Capital/Drawdown Structures strongly preferred
- Familiarity with Anti-Money Laundering/Know Your Customer Regulations as well as Due Diligence requirements.
- Understanding of currency and derivative overlay implementation and monitoring
- Strong interest in and general knowledge of investments and financial markets.
- Willingness to ask questions and be a self-starter.
- Proficiency with Microsoft Excel and familiarity with other Microsoft Office software. Experience with Bloomberg and FactSet is a plus.
- Must be based in China and eligible to work in China without sponsorship

All applications MUST include a resume and a cover letter for consideration.

Please apply directly to:

<https://phe.tbe.taleo.net/phe02/ats/careers/v2/viewRequisition?org=CAMBRIDGEASSOCIATES&cws=47&rid=7990>

Cambridge Associates is an equal opportunity employer. Diversity and inclusion are essential elements of our culture. We are committed to fostering an environment where individual perspectives, backgrounds, and life experiences make the firm a great place to work and result in a more satisfying client experience.