

Employment Opportunity:

Client Services Associate – Portland

If you want to work with an industry leader, in a dynamic environment that fosters professional growth, we invite you to join our team. With over \$5 billion in assets under management, R.M. Davis is Northern New England's largest wealth management firm, with offices in downtown Portland, Maine and Portsmouth, New Hampshire.

The Position

R. M. Davis is looking for a self-motivated professional with a customer service mindset to join our expanding team as a **Client Services Associate** at our downtown Portland headquarters.

Your Skills

- Professional, friendly demeanor with client-first mindset
- Excellent interpersonal, relationship building and communication skills
- Strong organizational and time management skills
- Strong attention to detail with a high level of accuracy
- Able to climb stairs and lift/carry up to 10 pounds
- A college degree and prior work experience in an administrative support role, preferred
- Proficient with Adobe as well as Microsoft Office (Word, Excel, PowerPoint and Outlook)

Your Responsibilities

Given the nature of our work, our administrative support team plays an integral role in the success of our firm, and the work we do for our clients. The **Client Services Associate** role is responsible for providing a broad range of internal administrative support to other staff members and managers in the provision of service to our clients. This support primarily involves the preparation of client and prospect meeting materials and presentations. In addition, this position assists with mass mailings, including quarterly reporting. The **Client Services Associate** also provides assistance with other project-related work and various other functions.

Your Work Environment

At R. M. Davis, teamwork is everything. Each day, we strive to deliver the very best we can for our clients, and we rely on our colleagues to help us reach this goal. Together, we create a network of support for each client that spans their wealth, financial, and personal needs.

This position is located in our Portland, Maine office. For more than forty years, R.M. Davis has been a vital and respected member of Portland's business community. Our offices are in the historic Hay building in downtown Portland, just a few steps from the waterfront, restaurants, businesses and performance venues that define our city as one of America's most vibrant. Among the many accolades Portland has recently received:

- *Bon Appetit* magazine named us their [2018 Restaurant City of the Year](#).
- *Fodor's* named us one of their 52 global destinations in their [2020 Go List](#).
- *Conde Nast Traveler* recently profiled us in [14 Best Things to Do in Portland, Maine](#).

Why do people come to Portland? They like the big-city amenities in a small-city environment. There is easy access to the working waterfront, nearby beaches and, a little further off, lakes, mountains and excellent skiing. People in Portland truly get to know one another, and that familiarity makes living here a pleasure.

Your Company Benefits

- Competitive compensation and bonus
- 401k plan with employer contributions
- 100% company-paid employee health insurance and disability insurance
- Paid time off, including paid parental leave
- Education reimbursement
- Company paid, covered parking
- Professional downtown office setting
- Collaborative work culture

This position is a non-exempt position and therefore qualifies for overtime pay.

If this sounds like you, please send a cover letter and resume to:

R. M. Davis, Inc.
Attn: Cathy Girr
24 City Center
Portland, ME 04101
cgirr@rmdavis.com