POSITION TITLE: Private Client Associate – Wealth Management

WHAT WE DO: Alpine Private Capital's fiduciary duty holds us to the highest level of client care in the financial services industry. That is why we are dedicated to serving as a steadfast advocate for the financial well-being of our clients. A significant focus of what we do is helping clients make informed decisions in the many different facets of their financial lives by taking the time to understand their priorities, concerns, and financial history.

Ultimately, our mission is to identify and achieve each client's financial objectives through superior financial advice, essential investment principles, uncompromising capital protection, and proven investment results.

We are unique Advisors. We do not sell insurance products, we do not earn commissions, we are 100% fee-based Wealth Management Advisors implementing a value-focused investment philosophy to achieve our clients' goals and objectives. **Our purpose is to enhance the lives of our clients by eliminating any concerns they have regarding their wealth and finances.**

As a St. Louis based SEC Registered Investment Advisor, Alpine Private Capital, LLC and its affiliate ACR Alpine Capital Research, LLC, manage $3.1 billion in client assets. www.apc-invest.com.

ABOUT THE POSITION: As a member of the firm's Advisory Team, the Private Client Associate will work directly with clients to meet their needs and will assist the team's Advisors in expanding existing client relationships. The Private Client Associate will be responsible for opening accounts, responding to client inquiries, preparing client reports, assisting with client related research projects as well as other special projects, and supporting the Advisory Team in any way necessary to drive the success of the firm. The Private Client Associate will also work directly with both the Vice President of Client Administration and the President on projects and tasks to ensure the smooth functioning of the firm.

ACTIONS TO ACHIEVE SUCCESS: Working directly with Alpine Private Capital's Vice President of Client Administration and the Advisory Team, the Private Client Associate's responsibilities will include, but are not limited to the following:

- Serve clients at the highest possible level to ensure that any and all wealth management concerns are promptly and accurately addressed. Our objective is to make our clients' lives as stress free as possible.
- Support the Advisors and clients in the account opening process.
- Facilitate the transfer of funds on behalf of clients.
- Prepare monthly, quarterly and annual reports for clients using the Tamarac system. This includes preparing bound booklets for Annual Investment Reviews.

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- Participate in team meetings, team projects, and other tasks to advance the growth of the business and improve the process by which we serve our clients.
- Support the operations team as necessary.
- Effectively, respectfully and professionally communicate with all clients, teammates, vendors and partners.
- Complete special projects on an as needed basis, often using Excel.
- Support other teammates even when that support calls for duties that are outside of the Private Client Associate's primary job description.

QUALIFICATIONS TO MEET OUR CLIENTS NEEDS: The successful candidate will be an intelligent and highly energetic professional who has experience in the financial services industry or is committed to becoming a financial services professional. The Private Client Associate position demands a person with a very professional demeanor who enjoys and excels at multi-tasking, is a very effective problem-solver and an optimistic, can-do team player. Additionally, a very strong passion for client service is absolutely critical as are strong organizational skills. Other qualifications include:

- A desire to make a strong, positive difference in our clients' lives.
- A desire to help others, both clients and teammates, achieve success.
- Highly reliable, professional, respectful and conscientious.
- A penchant for completing multiple tasks completely and quickly.
- Highly competent using Excel, Word and Outlook.
- Demonstrated success working both independently and in a team environment.
- Ability to handle multiple tasks accurately and efficiently.
- A strong team player with a very positive attitude and a willingness do what it takes to get the job done.
- Demonstrated experience handling and resolving complex problems quickly and efficiently.
- Outstanding ability to respond accurately and quickly to all client requests.
- Knowledge of financial markets and general financial planning concepts is preferred.
- **Candidates with experience with the Schwab custodial platform and the Tamarac reporting system will receive special consideration.**

COMPENSATION: Competitive compensation including generous benefits for top candidates.

Please contact Meaghan McIntyre at 314-932-1010 or at mmcintyre@apc-invest.com.