

STACK FINANCIAL MANAGEMENT



625 Wisconsin Avenue ♦ Whitefish, Montana 59937 ♦ 1-800-790-5001 ♦ www.StackFinancialManagement.com

Client Relationship-Manager

A unique career opportunity to join a nationally renowned financial investment firm located in Whitefish, Montana. Our growing company offers a challenging and rewarding career for the right individual. This position requires a motivated professional who is committed to exceptional client service in a fast-paced and detail-oriented environment.

Responsibilities:

- Interfacing with high-net-worth clients throughout the United States
- Account setup and maintenance
- Maintaining critical and sensitive client data
- Operational support using multiple software programs

Qualifications:

- Excellent phone and written communication skills
- Highly organized with strong attention to detail
- Ability to multi-task, prioritize, and manage a variety of projects
- Proficient in Microsoft Office
- Aptitude for mastering new software applications and systems
- College degree and 5+ years related experience

Starting Salary:

Competitive compensation with generous retirement plan (up to 25% of salary).

Qualified candidates send cover letter and resume to:

Stack Financial Management
625 Wisconsin Avenue
Whitefish, MT 59937
careers@stackfinancialmanagement.com

*– Non-smoking environment –
All inquiries will remain confidential*