



Client Relationship Manager - Private Client Services

Job type: Full-time, exempt.

Location: Hybrid schedule (3+ days in office per week) in San Diego.

Role summary:

TEAM Risk Management Strategies (www.teamemployer.com) is looking for a Client Relationship Manager to join and support our rapidly growing company. TEAM serves as the employer of record on behalf of over 3,500 clients for 6,000 worksite employees across all 50 states. Client Relationship Managers report directly to the Director of Private Client Services and are responsible for consulting with our high-net-worth and ultra-high-net-worth clients and other stakeholders to manage and direct various employment lifecycle processes, from onboarding to offboarding, and to resolve other employment issues.

This role serves as a trusted partner to high-net-worth and ultra-high-net-worth advisors and their clients by effectively collaborating with stakeholders to resolve client inquiries and manage all aspects of the account and employee lifecycle. The ideal candidate has executive presence, demonstrates impeccable organizational skills to manage competing priorities, and can effortlessly combine a business-centric mindset with creative, client-centric service. The right candidate enjoys variety in their work, and likes being challenged by new opportunities.

Responsibilities you will own:

- Deliver customized white-glove service to ensure satisfaction of all clients and other stakeholders.
- Manage and direct all aspects of the account and employee lifecycle, including onboarding and offboarding.
- Foster strong, consultative partnerships and serve as a trusted advisor to clients.
- Consult with clients and internal teams to ensure employment policies and practices are compliant with all federal, state, and local guidelines.
- Navigate service or employment-related issues and drive successful, client-centric resolutions.
- Quickly learn to proactively identify and mitigate HR and compliance risk for clients.
- Drive critical strategic initiatives and special projects in collaboration with the leadership team.
- Lead and/or participate on project teams and perform other duties as assigned in support of key company and department objectives.

We're looking for someone who:

- Has 2-3 years of progressive experience in a client-facing role at a top-tier firm. Relevant backgrounds may include a wide range of roles, including financial services/banking, consulting, corporate strategy, and more.
- Has impeccable communication skills and effectively relays complex concepts in a clear and concise manner.
- Leverages strong executive presence and emotional intelligence to develop trust and inspire confidence.
- Demonstrates accountability by taking complete ownership of client and employee relationships and outcomes.
- Solves problems creatively with a strategic, solutions-oriented mindset.
- Has the ability to guide and influence outcomes, often in very fluid and nuanced situations.
- Manages multiple projects and processes efficiently and autonomously, and executes with a high degree of quality and accuracy.
- Takes initiative to proactively get ahead of issues, with a strong desire to learn and apply new concepts quickly.

Benefits: Company-sponsored medical, dental and vision plan for employees and their dependents, 401(k), wellness program, learning development program, life insurance, long-term disability coverage, charitable contribution matching, volunteer time off and employee assistance program. In addition to accrued vacation time and sick time, TEAM recognizes 12 paid federal holidays. We also offer our team members the option of alternative work schedules. For team members based out of the San Diego office, we provide daily catered meals, weekly massages, onsite fitness center, a fully stocked pantry, happy hours, free parking and much more.

About TEAM Risk Management Strategies

Founded in 2003, TEAM Risk Management Strategies is the leading provider of outsourced payroll, human resources and risk management solutions to fiduciaries, trust beneficiaries, high net worth families and other worksite employers of domestic staff and service providers. By serving as the employer of record, TEAM protects those who would otherwise directly employ domestic staff and other service providers from employment-related risks and assumes the hassles of employee administration through the provision of workplace insurance, liability coverage and compliance with evolving employment law. We pride ourselves on providing

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fanatical customer service nationwide in partnership with hundreds of financial institutions, including many of the nation's largest banks, wealth managers, law firms and corporate partners. We are a high-performing team pursuing aggressive growth targets. The business has organically tripled EBITDA in the last 5 years. We maintain a collegial and fun-loving culture underscored by frequent team celebrations, office pranks and a common passion for those we serve.

Our vision:

To provide expert employment solutions, compassionate service, and creative partnership to the people we serve.

Our mission:

The people we serve and those who support them have peace of mind knowing they can choose their own service providers without the burden or risk of being an employer.

Our values:

- **Teamwork:** We care about each other and the work that we do. We are always ready to lend a helping hand and work together to solve even the toughest challenges.
- **Customer service:** We consistently go above and beyond to provide the highest level of service to our clients. We are responsive, creative and will find a solution to any problem.
- **Accountability:** We are passionate about the work that we do. We hold ourselves and each other accountable to a high standard of quality.
- **Integrity:** We are honest and ethical in our interactions and we do the right thing for the right reason, 100% of the time.
- **Compassion:** We care deeply about our clients, our employees, the families we serve, and each other. We are open-minded and enter into our interactions with respect and an assumption of positive intent.
- **Fun:** We take our work very seriously but not ourselves and we prioritize balanced lives for our team.

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