Retirement Plan Services Client Account Manager – located in Dallas and Houston, Texas

BOK Financial (BOKF), Headquartered in Tulsa, Oklahoma, BOK Financial Corporation (NASDAQ: BOKF) is a top 25 U.S.-based financial services holding company with operations in ten states – Oklahoma, Texas, Arkansas, Arizona, Colorado, Kansas/Missouri, New Mexico, Nebraska and Wisconsin. The company began more than 100 years ago in Tulsa and has successfully diversified into a variety of industries, businesses and geographies.

Summary

If you are looking for a job that combines a passion for innovation, an opportunity for growth, and a culture of teamwork, then you've come to the right place. We have an exciting opportunity awaiting someone like you!

About the Role

You will be responsible for administering, managing, and overseeing the services delivered to the bank's Institutional Wealth Clients. You will interact with internal and external customers, providing world-class service primarily over the phone, via email, and virtual/in-person meetings. You will serve as a liaison between Trust Operations and our clients. Your role is critical in maintaining strong client relationships and ensuring client satisfaction with our Institutional Wealth Services.

What You Can Expect

Every day will bring you a new set of tasks to prioritize and manage. You will juggle multiple tasks throughout the day to assist clients and Relationship Managers on your team with various needs. Strong communication, teamwork, and the ability to multi-task are the keys to success in your role.

Team Culture

We achieve more together by being involved, committed, and collaborative. We respect, honor and praise one another for a job well done. We celebrate each other's wins, big and small.

How You'll Spend Your Time

- You will effectively manage and administer assigned Institutional Wealth client accounts, which includes analyzing, evaluating, recommending, and implementing solutions for various complex client-related issues and problems that arise.
- You will interact with plan participants, auditors, attorneys, investment managers, and accountants regarding problem resolution and account maintenance.
- You will oversee all client services, including calling client contacts to ensure retention, anticipating service needs, communicating enhancements, and resolving any questions or issues presented.
- You will plan and implement the transition of new Institutional Wealth clients.
- You will assist with analysis and preparation for client investment review meetings, including compiling analytical and report information
- You will research and resolve any self-directed brokerage issues, problems, or disputes for retirement plan accounts or investment management issues for institutional accounts.

We'd Like to Talk to You

COLLABORATION: You enjoy working in teams and across departments with a proficiency to follow up and follow through.

COMMUNICATION: You will need exceptional verbal and written communication to express yourself clearly and concisely to internal and external clients.

DETAIL ORIENTED: Follow-up/follow-through and accuracy are crucial to ensure a smooth process for all parties involved.
DRIVE FOR RESULTS: You consistently maintain high levels of productivity, work with ambition, efficiency, and determination to meet and/or exceed goals.

ORGANIZATION: You will need to be efficient in handling multiple requests and prioritize your work.

POSITIVE ATTITUDE: You enjoy working with others and remain positive in a fast-paced work environment.

RELATIONSHIP BUILDER: You enjoy building relationships with internal and external clients.

Education & Experience Requirements

This level of knowledge is normally acquired through completion of a Bachelor's Degree and 5-7 years related experience **or** 9-11 years related work experience in Retirement or Institutional Trust Services, trust, legal or investment environment.

BOK Financial is a stable and financially strong organization that provides excellent training and development to support building the long term careers of our employees. **With passion, skill and partnership you can make an impact on the success of the bank, our customers and your own career!**

BOK Financial is an equal opportunity employer. We are committed to providing equal employment opportunities for training, compensation, transfer, promotion and other aspects of employment for all qualified applicants and employees without regard to sex, race, color, religion, national origin, age, disability, sexual orientation, genetic information or veteran status.

Apply today https://bit.ly/37tTxqb and take the first step towards your next career opportunity!
Contact Aimee Schwartz at aschwartz@bokf.com for confidential consideration.