BOK FINANCIAL

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Careers at BOK Financial

Institutional Wealth Client Account Manager

Houston, TX, US
Req ID: 49545

Areas of Interest: Trust; Wealth Management

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. .

The **Institutional Wealth – Client Account Manager** is responsible for services delivered to Institutional Wealth Clients. Analyzes, develops and implements solutions for extremely complex account and departmental problems and issues. Generally incumbent works independently, with direction from Institutional Client Advisor.

PRINCIPLE DUTIES AND RESPONSIBILITIES:

1. Effectively manages and administers assigned accounts. Analyzes, evaluates, recommends and implements solutions for various complex client related issues and problems that arise. This includes problem resolution with large client accounts and/or exceptions; serves as liaison between trust operations and client; performs complex research, develops solutions and communicates the resolution of the problem to client. Interact with plan participants, auditors, attorneys, investment managers, and accountants via telephone, e-mail, written communications or meetings regarding problem resolution and/or account maintenance; serves as liaison between Trust Operations and client; performs research and communicates the resolution of the problem to client.
2. Oversees all services provided to the client. Calls on client contacts to ensure client retention; anticipates service needs, communicates enhancements; resolves any questions or issues presented by clients. Manages all Institutional Wealth services provided to the client. Delivers Institutional Wealth Services which may

include coordinating with Trust Operations, Trust Investments, Trust Tax, and Trust Legal.

3. Plans and implements the transition of new Institutional Wealth clients including large and complex account relationships; communicates with prior service providers and new client; organizes transfer of assets, coordinates transfer of recordkeeping data (for retirement plans); reviews all legal and other documentation regarding the transfer; develops and drafts suggested language where appropriate. Drafts and develops all forms of written communication that are necessary for the plan transfer.

4. Assists with the analysis and preparation for client investment review meetings. Includes compiling analytical and report information; reviews information for accuracy.

5. Sets example of commitment, responsiveness, ethics, professionalism, courtesy and appearance. Keeps current with laws; successfully completes training; participates in and supports projects; provides input and participates in quality improvement; and, serves on committees.

KNOWLEDGE, SKILLS and ABILITIES:

- Advanced knowledge of accounting practices and principles in order to effectively evaluate problems with trust statement activity and plan information
- Advanced knowledge of Retirement plans and Institutional Accounts; ERISA and IRS Regulations and applicable rules and regulations cover retirement plans and other accounts
- Advanced knowledge of investments including different types of investments and styles, as well as the basics of asset allocation and retirement planning
- Advanced knowledge of self-directed online brokerage system and documentation and Brokerage, Settlement and trading functions
- Thorough knowledge of PC, including knowledge of word processing and spreadsheet applications, trust and recordkeeping systems, web based systems utilized by clients, investment managers and participants
- Excellent oral, written and communication skills, including interpersonal skills
- Ability to analyze highly complex information and data in order to develop and recommend solutions in challenging projects

This level of knowledge is normally acquired through completion of a Bachelors 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!**

Apply today and take the first step towards your next career opportunity!

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.

Attention All Third Party Agencies, Headhunters, and Recruiters

BOK Financial and its Subsidiaries will not accept candidate submission by unsolicited third parties through this site or any company email address. All unsolicited candidates presented to BOK Financial and its Subsidiaries will be considered the property of BOK Financial. BOK Financial and its Subsidiaries will not be responsible for any fees associated with unsolicited candidates, nor will a contractual relationship be formed by the submission. BOK Financial and its Subsidiaries are not obligated and will not under any circumstances pay any fees to said third parties submitting candidates in this manner. BOK Financial and its Subsidiaries only forms contracts with recruiters with whom we have an established business relationship and with whom we have in place a signed agreement. All contact with BOK Financial and its Subsidiaries from third parties must be through our Human Resources Department. Any contact made outside of the BOK Financial Human Resources Department by a third party will cancel any future business relationships between the third party and BOK Financial.

Please contact recruiting_coordinators@bokf.com with any questions.

TOP 3 REASONS TO APPLY

Investing in our talent and building a great workplace is a top priority at BOK Financial.

- Empowered employees
- Award-winning culture
- Community commitment

ABOUT BOK FINANCIAL

BOK Financial is a regional banking powerhouse and one of the top 25 banks in the U.S. We are based in Tulsa, Oklahoma, and diversified in a variety of industries, businesses, and geographies throughout the U.S.

FACTS:

- 4,900 employees
- 27 Years of financial profitability
- $30+ billion in assets
- $5.2 million in charitable contributions in 2017

Nearest Major Market: Houston
Job Segment: Bank, Banking, Manager, Finance, Management

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