



## CornerStone Partners Client Service Associate, Portfolio Management

### Job Summary

As a Client Service Associate, you will play a pivotal role supporting the Portfolio Management Team in effectively communicating with client staff, boards, investment committees, and internal Investment and Operations team members. You will assist the Portfolio Managers in developing client materials, preparing for meetings, onboarding new client relationships, and other administrative tasks involved with overseeing client relationships and investment portfolios. CornerStone's Portfolio Management team serves as the interface between clients' investment policies, objectives, and portfolios and our investment process.

This is a full-time position with benefits that include an annual bonus, generous benefits package, including group health insurance, short- and long-term disability insurance, life insurance, and employer retirement plan contribution. This position requires the candidate to spend a minimum of 2 days per week with team members in CornerStone's Charlottesville office with additional time in the office during the initial training period.

### Core Responsibilities

Upon completion of training, you will have a wide range of responsibilities, including:

- Coordinating resources across the firm to support Portfolio Managers in creating customized communications and reporting for clients
- Managing project timelines, deliverables and stakeholder communications to ensure deadlines are met and resources are effectively coordinated
- Creating presentation content for client boards and committees that effectively communicates portfolio information and investment strategy
- Participate in client meetings, including collaborating on agenda and communication strategies and maintaining meeting notes. Occasional travel required to meet with clients
- Manage and prepare responses to outstanding client inquiries, requests and other follow-up
- Provide client service support by assisting with onboarding and administrative tasks for new and existing client relationships
- Conducting regular reviews of client documentation to maintain up-to-date records and reduce operational risk
- Maintain and utilize internal CRM system, including logging client contacts, pipelines, calendars, client calls, meetings and other relevant client updates
- Provide logistical support for onsite client meetings
- Provide support for business development engagement and materials

### Attributes of the Successful Candidate

- Adaptable
- Responsive
- Collaborative
- Highly organized
- High integrity
- Intellectual curiosity

### Required Skills/Abilities

- Strong communication skills (written, verbal, and visual presentation)
- Highly proficient in PowerPoint, Excel, and Word with the ability to produce high quality communications
- Ability to prioritize and manage multiple workstreams with a proven ability to meet deadlines
- Client-first mindset with a proactive approach to problem solving
- Attention to detail and process discipline
- Ability to handle confidential information with a high degree of professionalism
- Team player with a positive attitude

### Preferred Skills/Abilities

- Knowledge of various asset classes (equities, fixed income, alternatives) and financial markets

### Experience/Credentials

- 3+ years of work experience (note: experience in finance, investment or nonprofit management preferred)
- Minimum BA, BS or equivalent

### CornerStone Partners

CornerStone Partners, based in Charlottesville, Virginia, serves as the outsourced investment manager (OCIO) for nonprofit organizations. Our clients rely on the returns generated by their investment portfolios to fund their missions in health, education, conservation, and building and improving communities, and hire CornerStone to manage their investment program. The firm manages approximately \$25 billion (as of March 31, 2025) and has 34 employees. CornerStone is a dynamic, growth-oriented firm committed to developing a diverse and equitable workforce.

### To Apply

Please submit a resume and cover letter by visiting our Careers page at [www.cstonellc.com/careers](http://www.cstonellc.com/careers) and click "Apply for Open Positions." Applications will be reviewed as they are received, and we will be conducting interviews until the position is filled. CornerStone is not able to sponsor employees who would require a visa to work in the U.S.

Contact Susan Holtzman, HR Manager, with any questions about the position or to learn more about CornerStone Partners at [careers@cstonellc.com](mailto:careers@cstonellc.com).