

**Client Strategist Associate (CSA) – Key Private Bank  
February 2022**

Key Private Bank is looking for a Client Strategist Associate (CSA). The CSA provides trust and financial planning support to enable Fiduciary, Portfolio and/or the Regional Financial Planning Strategists to effectively advise clients and manage the administration of client accounts. They collaborate with the Client Experience Associates to deliver a seamless client experience and an optimal level of client service. Identifies and capitalizes on opportunities to expand and retain client relationships.

**REQUIRED QUALIFICATIONS**

- Bachelor's Degree Preferred or equivalent experience.
- A minimum of three to five years related work experience or equivalent combination of work/educational background.
- General knowledge and understanding of fiduciary, investment and/or financial products and services.
- Demonstrated proficiency and effectiveness in client service skills (including handling client/prospect and Center of Influence (COI) inquiries and relationships), communication skills (including verbal, phone and written), and problem resolution skills.
- Demonstrated proficiency and effectiveness in organizational skills including the ability to balance multiple requests and prioritize tasks in an efficient manner or order to support multiple people.
- Ability to interact effectively and collaboratively in a team environment.
- Ability to work, make decisions and manage client relationships independently while managing competing priorities.
- Ability to multi-task, quickly change direction and have an independent work ethic.
- Ability to maintain all servicing aspects of the client relationship.
- Ability to exercise discretion due to accessing and handling highly sensitive information.
- Demonstrated attention to detail.
- Ability to learn and use proprietary software, databases and systems.
- Proficient in all Microsoft Office Applications.

Interested candidates can learn more and apply using this link:

[https://keybank.wd5.myworkdayjobs.com/External\\_Career\\_Site/job/Canton-OH/Client-Strategist-Associate\\_R-6602](https://keybank.wd5.myworkdayjobs.com/External_Career_Site/job/Canton-OH/Client-Strategist-Associate_R-6602)