

Job Summary:

Client Onboarding is an important and instrumental part of our operations since it serves as one of the first opportunities to make an impression on our customers. Our goal and mission is to ensure the very best customer experience through operational excellence and leveraging the abilities of our hard-working people on our service-oriented team. We work proactively in partnership with internal Commodity Brokers, Client Services and Compliance teams to ensure transparency around our processes and promote efficient and smooth end-to-end onboarding of prospective clients and continuous account management.

Responsibilities:

- Thorough understanding of onboarding practices and regulations pertaining to Anti-Money Laundering (AML) & Know Your Customer (KYC).
- Support timely and accurate account processing by working closely with multiple FCMs to resolve issues and open new accounts in accordance with our service levels.
- Accommodate Broker needs in relation to opening and closing accounts.
- Ability to build relationships interacting effectively with key internal personnel and external clients and business associates.
- Identify gaps in required client documentation to approve new accounts.
- Keep key personnel informed of processing issues and red flags.
- Perform tasks relating to account maintenance and New Account operational processes.
- General Administration work, including filing and scanning paperwork.
- Create and manage user accounts and permissions.
- Manage and fulfill internal projects or other individual tasks as delegated.
- Embrace our culture of continuous improvement by identifying and participating in areas of opportunity for improvement in our onboarding process.

Required Qualifications:

- Must be determined, passionate and adaptable.
- Must be able to work effectively and patiently with a wide variety of personalities.
- Ability to effectively work among a solution driven team.
- Must be able to address Broker needs patiently and professionally through a variety of market conditions.
- Proven organizational and prioritization skills.
- Ability to multitask and be a proactive team player.
- Detail oriented with an ability to think beyond the scope of the task.
- Excellent verbal, written and interpersonal communication skills. Must be able to communicate clearly and effectively to our internal personnel and external partners.
- Must be able to effectively & efficiently self-manage to meet deadlines under pressure in a high volume vigorous environment.
- Computer proficiency in Microsoft Windows environment.
- Prior operational/back office, customer service, or related experience a plus.
- Bachelor's Degree in related field.

Accountability/Supervision:

Relationships:

Internal: Active communication across all departments, including Compliance, Accounting, Sales, Client Services, Partner Relations/Business Development

Equipment:

Utilizes a personal computer, standard and specialized software, and standard office equipment such as the telephone, fax, copier, etc. Proficient in Microsoft office(including MS Project). Excel knowledge a plus.

Working Conditions:

Works in an air-conditioned, well-lighted office, moderate noise level.

Qualifications:

Required: BA/BS Degree, Strong communication skills, both written and verbal, Extremely detail oriented, with strong organization and time management skills