

**Grantham, Mayo, Van Otterloo & Co. LLC (“GMO”)  
North American Global Client Relations  
Client Relationship Associate**

*Interested candidates should apply on GMO’s [website](#)*

**Company Profile**

Founded in 1977, GMO is a private partnership committed to delivering superior investment performance and advice to our clients. We offer strategies where we believe we are positioned to add the greatest value for our investors. These include multi-asset class portfolios as well as dedicated equity, fixed income, and absolute return offerings, many of which employ the firm’s proprietary 7-year asset class forecasting framework. Our client base is comprised primarily of institutions, including corporate and public defined benefit and defined contribution retirement plans, endowments, foundations, and financial intermediaries.

GMO, whose sole business is investment management, employs approximately 470 people worldwide and is headquartered in Boston with offices in San Francisco, London, Amsterdam, Sydney, and Singapore. We manage roughly \$70 billion in client assets using a combination of top-down and bottom-up approaches that blend traditional fundamental insights with innovative quantitative methods to identify undervalued asset classes and securities. Our valuation-based approach embeds several key factors, including: a long-term investment horizon, discipline, conviction, and a commitment to research. Our research emphasizes not only identifying and exploiting pricing dislocations but also understanding the long-term drivers of return in the markets in which we invest. We are known for our candor in sharing our views with clients and for our willingness to take bold, differentiated positions when opportunities warrant.

**Position Overview**

The role of a Client Relationship Associate (“Associate”) is to serve as a direct and dedicated resource for the North American Client Relationship Management team. The Associate will work under the direct supervision of the North American relationship team leader and their assigned relationship team members. This position will be based in our Boston, MA office.

**Responsibilities Include:**

- Provide dedicated support to Relationship Managers in an effort to build and maintain relationships with GMO’s institutional clients
- Dedicated responsibility for specific reporting and standard client service tasks each month
- Provide general client servicing and ad hoc support to clients, consultants and custodians. This will require excellence in: in person, phone based and written communication
- Collaborate with various groups across GMO including: Graphics, Operations, Performance, Investment teams, Shareholder Services, RFP, as well as Tax, Legal and Compliance
- Develop a thorough understanding of GMO’s policies and procedures in order to help facilitate the efficient delivery of information and services to GMO’s client community
- Assist in organizing GMO specific investor and marketing events
- Assist in the preparation for client meetings
- Participation in meetings, the preparation of presentation materials, and assistance with meeting notes and any follow-up items
- Work closely with GMO’s team of investment professionals independently and at the direction of the assigned team leader to ensure each client, consultant, or prospect experiences the highest level of satisfaction from GMO

- With time, understand and articulate GMO's investment strategies, philosophy and process.

**Required Skills:**

- At least 2 years of experience in the investment management business
- Bachelor's Degree (or equivalent)
- Will be required to pass Series 63, 7 and 3
- Demonstrated understanding of investment strategies and markets, including fixed income, equity and alternatives
- Some basic knowledge of the North American asset management industry
- Demonstrated superior client service skills
- Proficient in MS Excel and other Microsoft applications
- Ability to create, operate, maintain and organize databases
- Strong organizational skills and attention to detail
- Excellent written and verbal communication capabilities
- Strong analytical skills
- Previous experience working with relationship, marketing, or consultant management teams preferred
- Previous experience working with Salesforce or another CRM preferred

**Character:**

- High energy, positive attitude, professional and mature
- Comfortable working both independently and as part of a team
- Ability to prioritize multiple tasks, set goals and meet deadlines
- Self-directed and motivated
- High degree of intellectual curiosity
- Ability to professionally represent GMO and perform consistent with the firm's values