

Title: Client Success Specialist (Full-Time)

Location: Hybrid, New York City (Midtown).

The Company

IMTC is a New York City-based fintech company revolutionizing fixed income portfolio management. Its cloud-native platform equips investors managing portfolios for retail and institutional clients with advanced optimization and automation tools, streamlining complex workflows and enabling teams to focus on strategic, high-value decisions.

IMTC brings long-awaited change to fixed income workflows. The platform enables customization on a massive scale allowing firms to grow their businesses and launch new products. By automating manual processes and optimizing decision-making, IMTC helps clients achieve faster, more accurate, and more compliant investment decisions across portfolios, simultaneously.

IMTC provides end-to-end functionality for fixed income teams, including portfolio construction, order management, analytics, reporting, compliance, risk, and live pricing. With managed data services and a broad network of integrations, IMTC centralizes data from leading providers to ensure seamless connectivity. As the only cloud-native platform dedicated to fixed income, IMTC offers unmatched flexibility, scalability, and innovation.

IMTC serves many of the leading asset managers, Trust companies, RIAs, Broker-Dealers, and ETF providers across the U.S. This is a hybrid role with at least two days a week in the NYC office required.

The Opportunity

IMTC is seeking a proactive and client-oriented professional to join our Client Success team as a CS Specialist. In this role, you will be on the front lines of client engagement, serving as the first point of contact for daily support inquiries from our live clients. You'll play a critical role in ensuring timely, accurate, and high-quality responses to client needs while helping to maintain a seamless user experience on the IMTC platform.

This position is ideal for someone who thrives in a fast-paced environment, enjoys problem-solving, and is passionate about delivering exceptional service. You will also act as a key liaison between clients and internal teams—including Product, Engineering, and Sales—helping to surface client feedback, troubleshoot issues, and facilitate cross-functional communication to drive continuous improvement.

Responsibilities:

- Serve as the primary point of contact for client support, responding to daily inbound inquiries and troubleshooting issues in a timely and professional manner
- Monitor and manage support tickets, ensuring resolution within defined SLAs and escalating as needed.
- Perform ad hoc analysis for clients using the IMTC platform and Microsoft Excel.

- Play an active role in supporting all client data flows and assist with platform navigation.
- Support client configuration.
- Document client issues, feedback, and feature requests to help inform product development and improve platform usability. Train users on integrating our platform into their daily fixed income workflows.
- Collaborate with the product team on feature implementation and usability.
- Maintain and improve internal reporting capabilities using tools such as Salesforce.
- Provide clear and concise written and verbal updates to clients regarding timelines and product enhancements.

Qualifications:

- 3-7 years of experience in client success supporting fixed income investment teams.
- Knowledge of financial markets, specifically the bond market.
- A well-rounded understanding of fixed income analytics, trade operations, and risk characteristics.
- Excellent verbal and written communication skills.
- Thrives under pressure
- Advanced proficiency in Microsoft Excel.
- Experience with Salesforce is a plus.
- Enthusiastic, resilient, and team-oriented mindset.

What we offer:

- Exciting, fast-paced work environment
- Hands-on experience in a high growth company with a collaborative and team-oriented culture.
- Chance to contribute meaningfully at a pivotal moment in the company's growth.
- Competitive compensation and benefits

To apply, please send your resume to careers@IMTC.com.

IMTC is committed to ensuring equal employment opportunities for all employees, including qualified employment applicants. The company strives to maintain an environment free of discrimination based on race, color, religion, gender, national origin, ancestry, age, disability, genetic information, military or veteran status, marital status, sexual orientation, citizenship, or any other protected category or characteristics as defined by federal, state or local laws. This equal employment opportunity policy applies to all employment practices, including but not limited to recruiting, hiring, advertising, promotion, transfer, reductions in force, social and recreational programs, training, employee development, compensation and fringe benefits, discipline, and termination.

