

Client Service Associate:

We are seeking a Client Service Associate to join our team! As a Client Service Associate, you work in a client-focused, team-centered environment assisting the advisory team in servicing the needs of the firm's clients. You must be organized, have outstanding attention to detail, excellent computer proficiency, and great communication skills. You will regularly interface with clients and prospective clients, working to anticipate their needs, resolve their problems, and provide exceptional service. As a Client Service Associate, your deep understanding of firm policies, procedures, and technology, enables you to support financial advisors in their daily business practices (e.g., client meetings, on-boarding new clients, marketing, funds transfers, etc.). From maintaining back-office efficiencies to driving firm initiatives, you work to ensure the client experience is second to none.

Essential Job Functions for the Client Service Associate include:

- Provide support to the advisory teams by administering client data gathering, paperwork preparation and monitoring, and ongoing administrative support
- Execute client funds transfers via custodian systems
- Maintain CRM system with client information, tasks, workflows, etc.
- Facilitate account transfers with timely communication regarding status updates to advisory team
- Main point of contact with custodian and firm's technology service teams
- Interact with other departments, including Alternative Investments, as back office support
- Coordinate with clients' other advisors as needed (CPAs, attorneys, etc.)
- Provide general office support as needed
- Other administrative duties as needed

Required Knowledge, Skills, and Abilities

- Bachelor's degree from an accredited institution
- Customer service background preferred
- Enjoy being part of a team
- Capable of adapting to change in a fast-paced environment
- Excellent verbal, written, analytical, and organizational skills
- Community service driven and charitably minded
- Strong sense of ethics and confidentiality with all matters in relation to the firm
- Proficiency with MS Word, Excel, PowerPoint and Outlook