# Indeed Job Posting:

*Client Service Associate – Williamsburg, VA*

# Job description

As our firm grows, we are looking for the right person to join our team to assist with client service requests and the maintenance of our clients' financial plans. This is an existing role designed to assist the firm's wealth advisors with review meeting preparation, interfacing with clients, and managing CRM details. We have a robust process with accompanying process manual. We strive to provide an environment that is team-oriented, engaging and allows employees to do their best each day.

**Who are we?**

Our team is growing in skill and size, operating in a climate that demonstrates and encourages serving each other and our clients, seeking to see our mutual and individual goals reached. We are an independent financial services firm dedicated to fostering our clients' and team members' well-being. Our vision is to be our clients' financial partner for life. Our values are communication, collaboration, people and process. We believe each client's needs are unique, specific, and time-sensitive; therefore, our approach is highly personalized and proactive. We provide clear communication and caring attention to our clients. We strengthen our relationship with them and each other with every interaction.

This role will serve in the Williamsburg, VA office. Our offices provide comfortable, professional work environments. Our office culture is focused on service, excellence and accountability. As an established, independent financial planning firm, we expect the highest level of professional standards for each team member.

We are forward-thinking, strategic advocates making every effort to add value to our clients' lives. We lead and guide our clients to make wise financial decisions in every life stage. We hope to serve our clients by partnering with them to maximize their fulfillment and desired impact.

**Principal Responsibilities – Client Service Associate**

- Prepare client paperwork, confirm accuracy, and follow through to completion (to include DocuSign)
- Open new client accounts and provide input to advisors on adding account functionality
- Schedule meetings for clients, partners, and vendors
- Respond to, complete, and follow up on client requests

- Help prepare for client meetings - prep conference room, pull file, check CRM, etc.
- Create and follow up on CRM tasks
- Create and maintain client and prospect records using CRM system
- Prepare monthly/quarterly/ad hoc client reporting
- Be proactive in keeping advisors aware of incomplete or unresolved tasks
- Request needed information to maintain and build financial plans
- Assure proper liquidity for systematic withdrawal plans, RMDs, and cash requests from clients
- Participate in team meetings and other initiatives (process time, CSA meetings, team retreat, etc.)
- Maintain a good and solid relationship with all vendors, partners, and the business community

**Shared Responsibilities – Client Service Associate**

- Answer phone and welcome guests/clients in a professional and courteous manner
- Maintain a clean and stocked reception area and conference room
- Assist with client mailings, draft letters, and prepare and send outgoing mail
- Filing to include physical filing and scanning incoming mail or paperwork to upload or file where needed
- Post checks and maintain check log
- Develop and implement effective processes that improve the client experience and office efficiency
- Coordinate and assist with seminars and events as needed

**Preferred Qualifications**

- Exceptional customer service skills
- Ability to work well on a team
- Attention to detail
- Three years of experience in the investment/insurance industry; experience working with National Financial Services (NFS) processes and forms a plus
- B.A. or B.S. in Business, Communications, Economics, or similar field
- Alignment with core values of Communication, Collaboration, People, and Process
- Proficiency with computer programs, including Microsoft Word, Excel, and Outlook
- Ability to effectively prioritize workload and meet deadlines
- Sophisticated organization skills, including physical resources (such as files, manuals, etc.) and nonphysical resources (such as calendars, appointments, events, client contact records, etc.)
- A self-starter who can work independently

Job Type: Full-time

Salary: $40,000.00 - $60,000.00 per year

Benefits:

- Health insurance
- Paid time off
- Professional development assistance
- Retirement plan

Physical setting:

- Office

Schedule:

- Monday to Friday

Education:

- Bachelor's (Preferred)

Experience:

- Financial Services/Investment/Insurance: 3 years (Preferred)

License/Certification:

- FINRA Securities License (Preferred)