CARY STREET PARTNERS

CLIENT SERVICE ASSOCIATE

The Client Service Associate provides primary support to the Wealth Management Group and must possess excellent organizational skills and interpersonal capabilities to effectively interact with employees, clients, and vendors. The position will provide support to Financial Advisors, be responsible for all administrative duties, and assist in all areas of client operations including opening new accounts and account maintenance. The Client Service Associate must be detail oriented and have the flexibility and ability to prioritize various projects and take initiative on tasks. The position will work in the Abingdon, VA office.

Position Responsibilities and Essential Functions

- Maintains confidential and time sensitive material.
- Maintains various aspects of client accounts including opening new accounts, processing and submitting documents, and initiation and filing of client Investment Consulting Agreement.
- Maintains client hard copy and electronic files.
- Handles alerts and action items from platforms.
- Masters custodial, portfolio management, and customer relationship management software and platforms.
- Supports Financial Advisor by preparing correspondence and commentary, client proposals, presentations, and spreadsheets.
- Assists with client presentations, including preparing, assembling and proofreading various documents for client books, PowerPoint and Excel documents for presentations, and marketing material and various forms.
- Performs various clerical duties including copying, printing, assembling and binding of material for special projects as needed.
- Schedules client meetings, maintains Financial Advisor’s calendar, books conference rooms, and orders lunches, drinks or snacks.
- Assists with seminars through preparation and maintenance of invitee and attendee list, preparation and mailing of invitations and maintenance of responses, and vendor relations concerning orders and logistics.
- Maintains information in the contact management system.
- Assists with formulation of policies and procedures in regard to opening accounts, maintenance of client files, monthly preparation of information for client billing and other operational functions performed on a regular basis.
- Performs various administrative functions; answering and directing incoming telephone calls, opening, dating and sorting of incoming mail, preparation of outgoing US mail, courier or delivery service packages, ordering of supplies, and equipment maintenance.
- Maintains regular and reliable attendance.

Professional Experience & Attributes

- Five plus years prior experience preferred.

- Experience in financial services industry with operations or sales assistant experience preferred.
- Knowledge of First Clearing's Smart Station preferred.
- Equivalent of an Associate degree or 2 years of college preferred
- Current SIE & 7 license or the ability to obtain these licenses preferred.
- Ability to work effectively on multiple projects.
- Collaborative team player with positive attitude.
- Unquestionable integrity and good judgment.
- Ability to learn new processes quickly, take initiative, and multi-task with little supervision.
- Excellent verbal and written skills.
- Ability to organize and prioritize work with attention to detail.

Benefits

- Competitive salary.
- 401K: eligible to contribute on start date.
- Health, dental, vision and other benefits available.

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability or veteran status. Cary Street Partners participates in e-Verify and will submit your I-9 documentation to the federal government to confirm your legal eligibility to work in the United States.