

CLIENT SERVICE ASSOCIATE

The Client Service Associate provides primary support to the Wealth Management Team and must possess excellent organizational skills and interpersonal capabilities to effectively interact with teammates, clients, and the back office. 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, movement of funds, and account maintenance. The Client Service Associate must be detail oriented and have the flexibility and ability to prioritize various projects, have strong follow-through, and take initiative on tasks. This position will work in the Fredericksburg, VA office.

Responsibilities

- Maintains various aspects of client accounts including opening new accounts, processing, submitting, and filing documents.
- Assists with client presentations, including preparing, assembling, and proofreading various documents for client books; PowerPoint, and Excel documents for presentations; and marketing materials and various forms.
- Schedules client meetings, maintains Advisor's calendar, and books conference rooms.
- Supports Financial Advisor by preparing correspondence and commentary, client proposals, presentations, and spreadsheets.
- 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 incoming mail; preparation of outgoing US mail, courier, or delivery service packages, ordering of supplies; and equipment maintenance.
- Handles alerts and action items from broker/custodial platforms.
- Assists with seminars through preparation and maintenance of attendee list, preparation and mailing of invitations, and maintenance of responses, and vendor relations concerning orders and logistics.
- Masters custodial, portfolio management, and customer relationship management software and platforms.
- Provides client operational support, including getting the client online, entering trades, and executing money movement.
- Assist with data entry into the planning software provided by the firm.
- Performs various clerical duties including copying, printing, assembling, and binding of material for special projects as needed.
- Organizes client files and securely handles confidential material.
- Maintains information in the contact management system.

Professional Experience & Attributes

- Collaborative team player with positive attitude.
- Strong written and verbal skills to effectively communicate with clients, teammates, and other parties on behalf of the team.

- Ability to organize and prioritize work to manage competing business priorities.
- Drive to learn and willingness to continually grow professionally. This position offers the opportunities for increased responsibilities and growth potential.
- Prior experience preferred. Experience in the financial services industry, operations or sales assistant experience preferred.
- Unquestionable integrity and good judgment.
- Ability to learn new processes quickly and take initiative.
- Excellent verbal and written skills.
- Strong client orientation and customer service skills.
- Proficiency with Microsoft Office – Power Point, Excel, Word, Outlook.
- Equivalent of an Associate Degree or 2 years of college is preferred.

Benefits

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

Please note that this job is expected to be in the office.

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.