CARY STREET
PARTNERS

# 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 Virginia Beach office.

## Responsibilities

### Administrative Support

- Provide administrative support to Financial Advisor.
- Organizing Financial Advisor's email and Schedule meetings and manage calendar.
- Schedules client meetings, maintains Advisor's calendar, and books conference rooms.
- Supports Financial Advisor by preparing correspondence and commentary, client proposals, presentations, and spreadsheets.
- 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.
- Schedule complex travel arrangements and itineraries and expense management.
- Maintain and update network and hard copy files including scanning of documents and cataloging folders.
- Manage client gifts, birthday cards and other personalized touch points for Financial Advisor.

### Special Projects & Event Coordination

- Liaison between team and partners(i.e. marketing team, compliance, partners and third parties).
- Executing events for clients, prospective clients, teammates and partners.
- Assisting with other special projects.

### Client Service & Operations

- Maintains various aspects of client accounts including opening new accounts, processing, submitting, and filing documents.
- Assists with formulation of policies and procedures regarding opening accounts, maintenance of client files, monthly preparation of information for client billing and other operational functions performed on a regular basis.
- Handles alerts and action items from broker/custodial platforms.
- Masters custodial, portfolio management, and customer relationship management software and platforms.

- Provides client operational support, including getting the client online, and executing money movement.
- Organizes client files and securely handles confidential material.
- Maintains information in the contact management system.
- Maintain records for compliance purposes.
- Manage special projects and other administrative and operational tasks as needed.

**Professional Experience & Attributes**

- Collaborative team player with a positive attitude.
- Strong desire to help and serve others.
- Excellent 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.
- 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.
- 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.