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.

Position Responsibilities and Essential Functions

- Provides a consistently positive client experience through excellent service and execution in maintaining client accounts.
- Displays exemplary client service skills and mindset operating with a high degree of accuracy, attention to detail, organizational skills, and follow-through.
- Displays deep industry knowledge in assisting clients.
- Follows strict adherence to all CSP compliance policies, procedures, and standards.
- Maintains client files & profiles in the contact management system.
- Leads account opening, money movements, account transfers, wires & all account maintenance & documentation.
- Enters data & builds client profile in eMoney.
- Prepares daily & weekly transaction ledgers.
- Handles alerts and action items from platforms.
- Regularly prioritizes and manages time-sensitive tasks.
- Masters custodial, portfolio management, and customer relationship management software and platforms.
- Supports Financial Advisor by preparing correspondence and commentary, client proposals, presentations, and spreadsheets.
- Manages meeting logistics, materials & presentations.
- Assists with formulation of policies and procedures for 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 for the office: answering and directing phone calls, managing incoming and outgoing mail & packages, ordering supplies, & maintaining office equipment.
- Assists Financial Advisors, Branch Office Manager, or Regional Manager with client or office events & initiatives.
- Maintains regular and reliable attendance.

Professional Experience

- Prior professional experience preferred.
- Experience in a similar role within the financial services industry preferred.
- Bachelor’s degree or Associate’s degree required.

- Experience with custodial and client relationship management systems preferred.
- Knowledge of eMoney software preferred.

Personal Attributes

- Excellent written and verbal communication skills to interface with clients, employees and vendors.
- Unquestionable integrity and good judgment.
- Strong client orientation and customer service skills.
- Ability to organize and prioritize work with attention to detail.
- Collaborative team player with positive attitude.
- Ability to learn new processes quickly, take initiative, and multi-task with little supervision.
- Proficiency with Microsoft Office Products – Power Point, Excel, Word, Outlook.