Omega
WEALTH MANAGEMENT, LLC
Integrating Your Values, Vision and Wealth

Client Service Specialist (CSS) Job Description

Omega Wealth Management, LLC is currently seeking a full-time Client Service Specialist. The Client Service Specialist position centers around our relationship with our clients. Our next hire will manage questions and concerns from our clients to ensure that advisors spend their time giving advice. This hire will fall in love with our clients, our process for creating success, and our unwavering commitment to do what is right. This hire will have a strong attention to detail and will be the first line of communication with the client.

General Responsibilities:

- Serve as point of contact for all client interactions, questions, and concerns
- Manage client routines and ongoing maintenance
- Manage pre-meeting and post-meeting deliverables
- Support the Advisory Team in all actions for client success
- Support and enhance the tech stack and internal processes
- Provide life changing client service and support as needed

Preferred Skills:

- Bachelor's degree or comparable education/experience
- Background in finance, business, and/or economics
- Background in securities, regulations, financial planning, and investment management
- Commissioned as a Notary Public
- Familiar with CRM and Financial Planning tools (Junxure, MoneyGuidePro, eMoney, Schwab and SEI platforms, etc.)

Keys to Success at Omega:

- Desire to grow personally and professionally (college degree, certifications, designations, Series 65 license, etc.)
- Professional and knowledgeable demeanor
- Knowledge and experience in the financial services industry
- Strong verbal and written communication skills
- Ability to identify and solve client issues and concerns
- Serve as a goal-oriented team player that interacts effectively with all members of the team
- Strong attention to detail
- Strong organizational and time management skills
- Ability to perform multiple tasks efficiently and accurately
- Exceptional phone and client service skills
- Comfortable with learning new technology

Omega is known for a culture of collaboration, commitment, and support by offering the following benefits:

- Paid parking (if needed)
- 8 paid holidays, your birthday off (or an extra day of leave), and a holiday break between Christmas and New Year's Eve
- Opportunity to start 100% virtual or hybrid – Currently, Mondays and Fridays work virtually, Tuesdays-Thursdays in the office
- Summer Fridays off
- Health/dental/vision insurance plan or reimbursement of up to $200/month
- Basic short and long-term disability and basic life insurance
- 3% Safe Harbor 401k annual contribution, regardless of your participation in the plan

About the firm:

Omega Wealth Management, LLC is a woman-owned business, founded in 1999. Omega specializes in taking a holistic and comprehensive approach to working with people going through significant financial/business/life transitions and successful entrepreneurs. Currently, Omega has 4 advisors who are all CFP® professionals and Certified Financial Transitionists® and we are looking to expand our business based on a well-articulated strategic plan using the Entrepreneurial Operating System®.

We live and breathe the Omega Core Values: Authenticity, Client-Centered approach, Curiosity, Always Evolving, Servant Leadership, "Walk the Talk", and a focus on Balance in various aspects of our lives and work.

Salary: Starts at $55k-65k, but could be modified based on a candidate's experience, passion, and demonstrated professional development.

Cover letters and resumes can be e-mailed to: info@omegawealthmanagement.com