As a Barron's Top 100 RIA firm and voted *Best Places to Work* by Fortune, Pacific Coast Business Times, Inc (Best Workplaces), and Investment News, Mission Wealth is hiring a dynamic **Client Services Representative** to join our high-performing Operations department. This is an opportunity to work a hybrid schedule AND elevate your career in wealth management, working with a team that will inspire your professional and personal best! As our Client Services Representative, your creative problem-solving skills and impeccable attention to detail are key to providing support to the Operations department as well as assisting the onboarding of new clients. With a knack for optimization, you will continually look for and recommend ways to improve systems and streamline functions. You promote open communication channels and an amicable team environment that benefits fellow employees, clients, vendors, and consultants. Your commitment to making a positive impact in other people's lives parallels your drive for personal and professional growth.

Ranked one of the top RIAs in the country, Mission Wealth has offered 360-degree wealth management services to affluent families since 2000. Our dynamic planning process ensures that every piece of the puzzle is put into place as our clients' lives unfold and their needs evolve. This gives them the complete picture and confidence in their future.

Day-to-Day as Client Services Representative:

- Provide professional and targeted support to the Central/East Coast Operations team, with this position being based in **Austin, TX**
- Prepare New Account paperwork, establishing various registration accounts utilizing our preferred custodial referral platforms (Fidelity, Schwab & TD), and prepare Alternative Investments paperwork
- Facilitate account transactions, maintain account registrations, submit, and track account transfers, and assist in obtaining cost basis
- Scan and upload registration documents to Salesforce CRM
- Assist clients with accessing our client portal and uploading documents for clients to access
- Perform administrative office duties including processing all incoming and outgoing mail
- Provide client account information to other departments as required and assist with projects as needed
- Speak your mind, have your voice heard, innovate, and streamline existing processes, and enjoy coming to work each day

What You Bring as Client Services Representative:

- Bachelor's degree
- 2+ years' proven experience in a client service role, within the financial industry
- Curiosity and problem-solving ability
- High emotional intelligence coupled with a passion for client service and experience
- Demonstrated operational experience with Fidelity/Schwab/TD custodial referral platforms and the specialized paperwork that goes with linking to existing accounts (LPOA)
- An impeccable eye for detail plus excellent multi-tasking and time management skills
- Strong knowledge of modern office methods and procedures
- Proficient with the full MS Office Suite
- Proven working knowledge of Salesforce
- Exceptional ability to read, analyze, interpret, and present information
- Adept with mathematical concepts, writing reports, and business correspondence

For further consideration, please submit a brief cover letter and resume outlining your proven success in client services, supporting operations in a financial capacity. Mission Wealth offers competitive salary + team-based bonus plan | medical/dental/vision benefits | 401K | PTO and VTO.