



**Austin Asset**  
AUTHENTIC ADVICE. FOR LIFE.

## **Wealth Management Client Service Coordinator**

### About this role:

Austin Asset is seeking a Client Service Coordinator to join their wealth management team. This position is responsible for serving as the primary service resource for a selective number of Austin Asset clients, focusing on client service excellence and custodian continuity.

### Experience you will bring:

- Provide support and work closely with advisors in onboarding and management of client relationships.
- Research and resolve moderate to highly complex account issues
- Manage client relationships proactively; follow up with clients; maintain complete records and files
- Demonstrate ability to onboard new clients, resolve client issues, unwind estates, complex account openings, and transfers with all custodians
- Display out-of-the-box thinking for practical client service solutions
- Demonstrate effective time management of workload with the ability to prioritize
- Make presentations to other associates and advisors
- Demonstrate strong administrative skills; handle all operation needs across advisor teams; provide recommendations for operation improvements
- Receive direction from leaders and exercise independent judgment while developing the knowledge to understand policies, procedures, and compliance requirements
- Collaborate and consult with peers, colleagues, and managers to resolve issues and achieve goals
- Demonstrate excellent written and verbal communication skills; serve as primary point of contact for assigned clients
- Contribute to revenue growth by communicating new opportunities for unmanaged assets to wealth management
- Demonstrate a clear understanding and adoption of the company's culture; exemplifies the company's culture completely
- Answering questions or concerns

### Required Qualifications:

- Bachelors degree or 3+ year's experience in a client service role in the industry
- Minimum of three (3) years of industry-related experience, RIA/Broker experience-highly desired
- Very strong working knowledge of financial investment concepts and practices, as evidenced by advanced financial training, education, or relevant experience
- Excellent analytical and quantitative skills



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- Excellent customer service and customer retention skills
- Strong written and verbal communications skills, with customer focus
- Strong working knowledge of Microsoft Office Suite (Outlook, Word, Excel)
- Comfortable and effective in a dynamic, flexible work environment requiring high degrees of accountability and self-motivation

## What Austin Asset has to offer you:

- Paid time off- 27 days annually, accrued per pay period
- Personal Volunteer time - 2 Volunteer days, volunteer for a non-profit organization of your choice
- Holiday, Bereavement, Civic Duty, Military Leave paid time off
- Sabbatical leave eligible after 10 years of service
- Maternity/Paternity/Adoption 10 weeks paid time off
- Health Benefits:
  - Medical Insurance (\* PPO /\*HSA & FSA), Vision Insurance\*, Dental Insurance\*, Prescription Drugs, Group Term Life & AD&D Insurance\*, Voluntary Life Insurance, Short Term Disability Insurance\*, Long Term Disability Insurance\*, Employee Assistance Program (EAP)\*, MDlive (through BCBS), Flexible Spending Account FSA & HAS, \* 100% of premiums are paid by the firm
- 401(k) Plan - 3% Company Safe Harbor match regardless of the employee participation level
- Various Bonus Opportunities: Quarterly Organizational Bonus - Based on firm wide profitability metrics, Performance Bonus - Based on Annual Performance Evaluation
- Career Development Program: Career Development, Career Advancement, and Ownership Plan
- Lifetime learning program: Financial reimbursement for professional development
- Unique Programs:
  - Firm-wide Community Volunteering Days
  - Employee Nominated Non-Profit Sponsorships
  - New Client Referral Bonus Program
  - Home Office Monitor and Laptop supplied
  - Employee Culture Committee
  - Monthly social events and milestone gatherings
  - Gourmet coffee, teas and healthy snacks stocked weekly
- Flexible Work Schedule, 50% Work from Home/Office
- Dynamic, collaborative, and fun culture!