**Client Services Associate - job description**

Summary:

Waterworth Wealth Advisors, LLC helps our clients achieve their financial goals through a financial advisory partnership built on integrity and trust. We take the stress out of managing personal finances by making them less complicated and taking a holistic, proactive, and streamlined approach.

We are seeking a motivated, self-directed individual who can help conduct the smooth operations of a fast-paced, growing financial planning firm. The Client Relations Associate supports the practice with various functions and tasks. The successful candidate will possess high integrity, energy, and excellent client-facing skills. The Client Relations Associate manages the CRM system, schedules appointments, and does meeting preparation and follow-through.

This role offers an opportunity for growth into roles with expanded responsibilities with a firm committed to high touch/high-tech comprehensive wealth management solutions for individuals with complex financial situations. If you are energetic, collaborative, client-focused, and have a heart to serve others, Waterworth Wealth Advisors is your place.

**Critical Outcomes and Responsibilities:**

• Supports the delivery of financial advice and services to clients, including handling all administrative functions with Financial Advisors and the firm with the goal of client retention, client satisfaction, and reaching business objectives

- Deepen client relationships through proactive, regular client interaction, including appointment scheduling and correspondence: answer all incoming calls and make positive client impressions on behalf of the firm

- Assist in client meeting preparation and follow-up, including assembling requisite paperwork, report generation, and post-meeting documentation

- Process, submit, and service all account paperwork/requests; follow through to completion utilizing paperless procedures

- Deposit checks received and maintain the check blotter in adherence to compliance guidelines

- Maintain CRM database; define and ensure adherence to appropriate client service models

- Maintain and internally audit digital Books and Records for compliance with recordkeeping requirements

- Manage and update mailing lists for birthdays, holidays, and firm marketing efforts

• Manage multiple and competing priorities daily in pursuit of business objectives

• Support client communications and social media marketing

**Qualifications, Skills, and Behavioral Requirements:**

• Bachelor's Degree along with a minimum of 3 years of executive administrative experience; financial services industry experience a plus

• Strong written and verbal communication skills

• Ability to pay close attention to detail, ensure accuracy and completeness of work

• Proficient with CRM Systems as well as Outlook, Microsoft Word, Excel, and PowerPoint

• Basic knowledge of financial principles, retirement products, or financial planning

• Proven ability to manage advanced, confidential administrative duties

• Outstanding organizational skills and excellent follow-through

• Capable of acting as a self-starter with an excellent ability to multi-task and prioritize

• Effective without direct management and a structured environment but able to follow procedures and regulatory requirements

• Prefers a systematic approach to decision-making but is capable of timely responses

• Prefers to be accommodating to the needs of clients and co-workers but is able to take a personal position that is different from the group's position when necessary

**Why would you want to work here?**

• A collaborative team environment with competitive pay and an opportunity for team bonuses

• Growth opportunity (education/experience/exposure to high-level investing and financial matters)

• Direct communication/access to the principle of the firm

• PTO and Holidays

• Discounted gym rates

• Health benefits

• Birthday and Team Celebrations

***Federal, State, and local background checks are required.

***Credit Check required

Interested parties should email their resume as well as a letter of interest to seana@waterworthwa.com.

We will start interviewing immediately, and we will accept resumes until we have the right person on board.